Prophet 4.0 User Guide

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PART I- INTRODUCTION 4

PART II- INSTALLATION 5
Installing Prophet 4.0 Client Edition 5
Installing Prophet 4.0 Server Edition 6
Prophet 3.0 Database: Install the Prophet Server Database on a separate machine 7
Prophet 4.0 Database: Install the Prophet Server Database to a separate SQL Server 2000 machine 7

PART III- CONTACT MANAGER 8

CONTACT RECORDS 9
ADDING AND DELETING CONTACTS 9
Keep personal contacts out of Prophet. 10
SETTING WORKING CONTACT FOLDERS 14
SCROLLING THROUGH YOUR CONTACT LIST 15
SHARING CONTACTS WITH OTHER PROPHET USERS 15
CREATING GROUPS FOR YOUR CONTACTS 17
VIEWING DATA FOR YOUR CONTACT RECORDS 19

COMPANY RECORDS 23
VIEWING COMPANY RECORDS IN CONTACT MANAGER 23
SCROLLING THROUGH YOUR COMPANY LIST 24
CREATING A COMPANY RECORD 24
ASSOCIATING CONTACTS WITH A COMPANY 25
WHAT IS INCLUDED IN THE COMPANY RECORD 26
VIEWING CATEGORIES OF COMPANIES 28
VIEWING DATA FOR COMPANY RECORDS 28
CONTACT MANAGER TOOLBAR 31

SALES ASSISTANT AND WORKFLOW 34

PART IV- OPPORTUNITY WINDOW 46
WHAT IS AN OPPORTUNITY? 46
CREATING A NEW OPPORTUNITY 46
FILLING OUT THE OPPORTUNITY WINDOW 49
LOOKING UP OPPORTUNITY RECORDS 59

PART V- OPPORTUNITY MANAGER 62
VIEWING YOUR OPPORUTNITIES 62
ADDING AND REMOVING COLUMNS IN THE OPPORTUNTIY MANAGER 63
RESIZING AND RESORTING COLUMNS IN THE OPPORTUNTIY MANAGER 64
IMPORTING OPPORTUNITY DATA 65
SHARING OPPORTUNITY DATA WITH OTHER PROPHET USERS 66
WORING WITH PROPHET OFFLINE 70

PART VI- PROPHET DASHBOARD 71

PART VII- GROUP EMAIL WIZARD **72**

PART VIII- PROPHET SEARCH **77**
CONFIGURING SEARCH FOR ADDITIONAL FOLDERS 80
SET UP PUBLIC FOLDERS IN CACHED MODE 81
VIEWING SEARCH RESULTS 85

PART VIIII- PROPHET ADMINISTRATOR **87**
CUSTOMIZATION OF THE OPPORUTNITY WINDOW 87
CUSTOMIZATION OF THE COMPANY WINDOW 95
CUSTOMIZATION OF PRODUCT GROUPS AND PRODUCTS 95
SETTING UP PROPHET SHARING 96
SETTING UP USER PERMISSIONS 100
BACKING UP YOUR PROPHET DATA 104

PART X- PROPHET REPORTS **105**
STEPS TO RUN A REPORT 105
FILTER AND SORT YOUR REPORTS 107
CREATING CUSTOM REPORTS 112

PART XI- PROPHET FOR PALM **117**
PROPHET FOR PALM VERSION I FEATURES 117
SYNCING YOUR OPPORUTNITIES TO YOUR PALM 117
VIEWING AND EDITING OPPORTUNITY DATA ON YOUR PALM 118

PART XII- CUSTOMER CARE AND CONTACT OPTIONS **128**
CUSTOMER SERVICE 128
CUSTOMER CARE 128
PROPHET TRAINING 128
PROPHET BEST PRACTICES IMPLEMENTATION SERVICE 128
OUTLOOK AND EXCHANGE PROFESSIONAL SERVICES 129

PART I- INTRODUCTION

What is Prophet 4.0?
Prophet transforms Outlook from a Personal Information Manager (PIM) into a full featured contact management solution. We do this by adding critical business relationship management features such as account level relationships, sales pipeline stages, and opportunity reporting and task management while retaining the familiar Outlook interface.

Deleted: opportunity

What Does "Built into Outlook" Mean and Why is it Good?
Other contact management software such as ACT! and GoldMine are separate applications from Outlook. This requires a user to either abandon Outlook all together, flip back and forth between the two applications or to constantly synch and integrate the two applications in order to communicate within their company and then manage their contacts with clients and prospects.

Avidian Technologies is an expert in Outlook and Exchange development. We have taken this expertise to create a contact management system that is much more powerful than Outlook by itself, but leverages the core features of Outlook to make managing the sales process much easier than working with a separate application. We do this by working at the object level within Outlook instead of just superficially swapping data between two applications.

"Built into Outlook" is good because you can now manage your sales opportunities from within the same application you manage your internal company communications. Outlook will now serve as the central platform for managing your sales process and reporting, as well as your day-to day company meetings and emails.

Top Six Reasons Prophet 4.0 will Help Your Business

1. **You will generate more business and keep customers happier.** The less time you spend doing chores like finding the right attachment or email, building reports for your boss or learning software – the more time you have to generate revenue!

2. **You will be more organized.** By keeping all of your emails, scheduling and tasks in the same application – it is easy to find the information you need to make that call or generate that report.

3. **You will have a better process for managing contacts and sales opportunities.** By using an established process for tracking opportunities including why sales were won or lost, you will be more effective in moving people through the pipeline to the conclusion.

4. **You can create personalized group emails with a few clicks.** Send a promotion or new product announcement to a group of prospects and/or clients using their individual names in the salutation with just a few clicks.

5. **Automate reporting for your boss.** Instead of re-building that Excel Spreadsheet every week to send to the boss, print out one of our pre-developed reports or customize your own to print out anytime you like. Saves time, looks good.

6. **Centralize your data.** With the Prophet Server Edition you can store all your data on a central server that your team can synchronize while offline.

PART II- INSTALLATION

System Requirements for Prophet 4.0

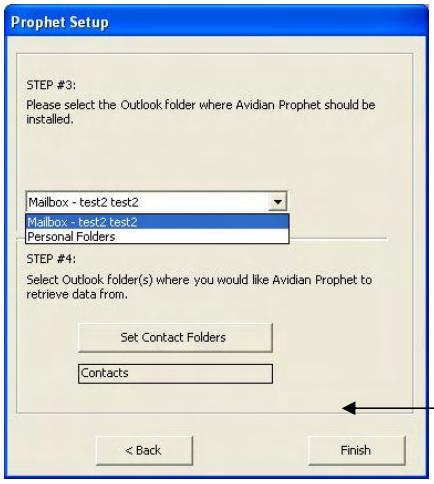
Server Machine Recommendations	Client Machine Recommendations
Windows 2000 or higher, Professional or Server Windows	Windows 2000 or XP Operating System
Outlook 2000, 2002 or 2003	Outlook 2000, 2002 or 2003
1.5 Gig CPU or faster	1.0 Gig CPU or faster
1GIG RAM Recommended	512K RAM Recommended
Drive Space (1G or more recommended)	Drive Space (500MB or more recommended)

Screen Resolution is recommended to be set at 1024 x 768

Installing Prophet 4.0 Client Edition:

Note: To install the Prophet software, make sure that the intended Prophet user's account has administrative privileges on the local computer. Log onto the machine with the intended users credentials.

1. Close all Anti-Virus and other active applications including Microsoft Outlook. Verify that Outlook is closed in Task Manager's 'Processes' tab.
2. Copy the Prophet executable to the local machine, or insert the CD.
3. Run the file: "ProphetSetup.exe" to start installation.
4. The InstallShield Wizard will guide you through the process of installing. Follow the instructions during the install process.
5. You will be prompted to fill in your Prophet serial number. The serial number can be found on your order confirmation.
6. You will be prompted to restart your computer.
7. Once restarted, open Outlook.
8. Step #1, #2: You will have the option of changing your user name. If you are installing a Prophet Client version and have a server version of Prophet on another machine, you will be prompted to select the server.
9. Click Next
10. Step #3 will prompt you to select the Outlook Mailbox where Prophet will be installed – usually, this is the Personal Folders mailbox. A new folder structure will be created in this mailbox titled "Avidian Prophet".
11. Step #4 will prompt you to select which folder you would like Prophet to pull contacts from. It will default to pull contacts from your main Contacts folder in Outlook. If you are using subfolders or Public Folders (with Microsoft Exchange) for your contacts, you can select the specific folder at this time. You can make changes to this selection later.



Contact Manager will be populated with the contacts in your Main Contact Folder in Outlook. To change the folder contacts are pulled from, click the Set Contact Folder and select the folder from your contact folder list.

12. Click Finish and you will now see the Avidian Prophet folder in your Outlook Folder List. Expand that folder to view Prophet's Contact Manager, Opportunity Manager and Report Manager folders.

Installing Prophet 4.0 Server Edition: (See Prophet Server Installation Guide)

NOTE: To install the Prophet Server software, make sure that the intended Prophet users account has administrative privileges on the local computer. Log onto the machine with the intended users credentials.
This account requires a Microsoft Outlook Profile, previously set up and initialized

1. Close all Anti-Virus and other active applications including Microsoft Outlook.
2. Run the file 'ProphetServerSetup.exe' to start installation or insert the installation CD.
3. Follow the instructions during the install process including entering your personal serial number received during the purchase.
4. Reboot your machine
5. Launch Microsoft Outlook
6. Select the Outlook Mailbox where Prophet will be installed – usually, this is the personal folders mailbox. A new folder in this mailbox will get created titled "Avidian Prophet" – You're done!

NOTE For users who have Prophet Server installed on Windows XP SP2, you must disable Windows Firewall for the server to work properly. To disable the firewall, open Microsoft Security Center by double clicking on the Security Center icon in your taskbar. Click Windows Firewall in the Manage Security Settings section at the bottom of the page, and select the Off option. Client machines connecting to a server are not affected by Windows Firewall.

NOTE For additional information on the "Best Practices" of setting and configuring Prophet Server edition with or without Exchange, please see the "Prophet Server Installation Guide".

Prophet 3.0 Database: Install the Prophet Server Database on a separate machine

1. Backup the Prophet Server database using Prophet Administrator. (Described later in the guide)
2. Copy the backup file to the other computer and launch SQL Enterprise Manager.
3. Restore the backup file into a database named Avidian.
4. Go to the Users tab for the Avidian database and delete the user "Avtuser".
5. In the password field, enter prophet01
6. Go to the Security tab→select logins→open "Avtuser".
7. Go to the Database Access tab and permit the database "Avidian" and the roles "public" and "db_owner".
8. Open Prophet Administrator on the Prophet Server and set the database server field
9. On all the Prophet Clients, open Prophet Administrator and point it to the new computer that has the Prophet Server database.

Prophet 4.0 Database: Install the Prophet Server Database to a separate SQL Server 2000 machine

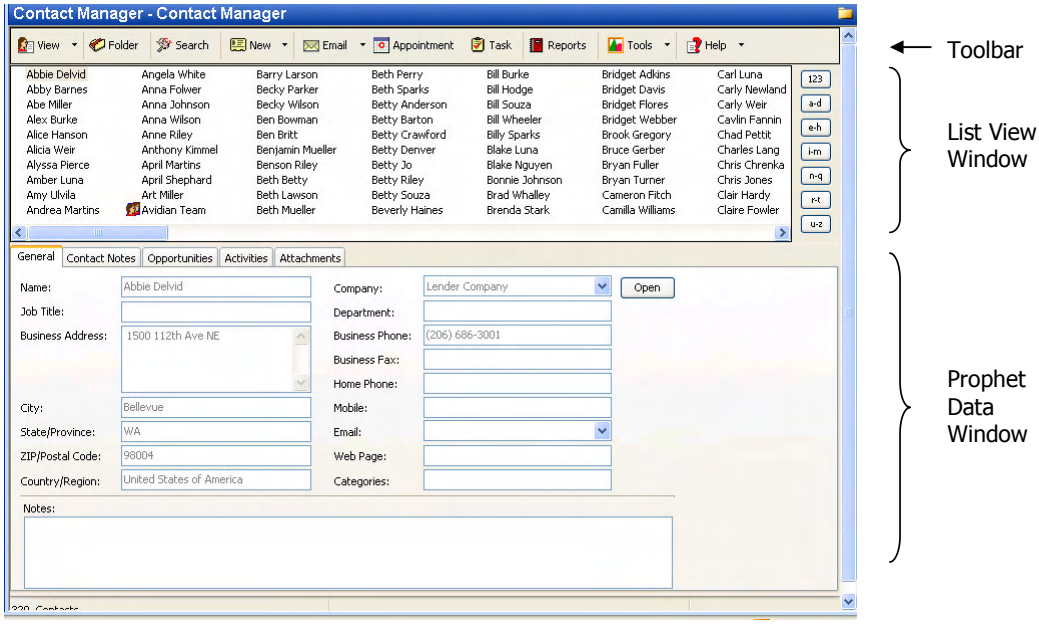
Steps

1) Restore the original **'AvidianDB.bak'** file onto the separate SQL Server 2000. (This file is included as part of the Prophet Server install.
NOTE: Do not use any other backup file!
2) When restoring the backup file, name the database "Avidian"
3) Expand the "Avidian" database node and click on Users node
4) Delete user "Avtuser"
5) Expand the "Security" node and click on Login
6) Create new user "Avtuser" with Password "prophet01!"
7) Click on the Database Access tab
8) Select "Avidian" database
9) In the Database roles section select "public" and "db_owner".
10) Click Ok

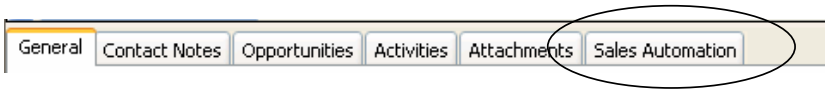
Now that the database is restored you will need to run the following script files only if you have FULL-Text Search already installed on your SQL Server box.
ProphetDBFullTextScript.sql
ProphetIndexTables.sql
sp_Search.sql
These files are located in the Prophet Server machine's 'C:\Program Files\Avidian Technologies\Prophet' folder.

PART III- CONTACT MANAGER

The Prophet Contact Manager is the central dashboard for managing contacts and company accounts in Prophet. It also serves as the launching pad for personalized group emails, the sales opportunity window, tasks, appointments, reporting and customization. It is divided into three main sections: The Prophet Toolbar, the List View Window and the Prophet Data Window.



For Prophet Professional and Enterprise users, the Contact Manager will have an additional tab in the Data Window called Sales Automation shown below.



CONTACT RECORDS

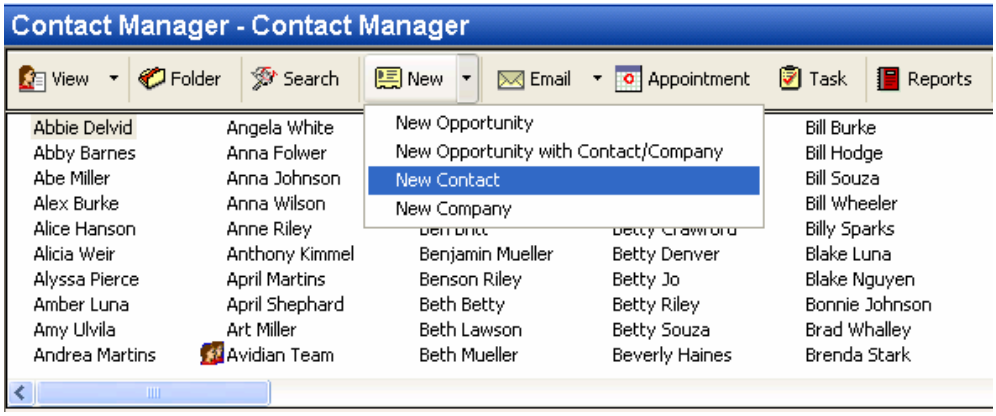
During the installation of Prophet, you were asked which Outlook Contact folder you wanted to work with in Prophet. The contacts in the folder you select will automatically populate the Prophet Contact Manager. The Outlook Contact folder you selected to work with is called the "Working Contact Folder"

ADDING AND DELETING CONTACTS

Adding a new contact.

There are a couple ways you can add a contact to your Contact Manager.

1. Using the New Button in Contact Manager
   a. Click on the arrow to the right of the **New** button in Contact Manager.
   b. Select **New Contact**.



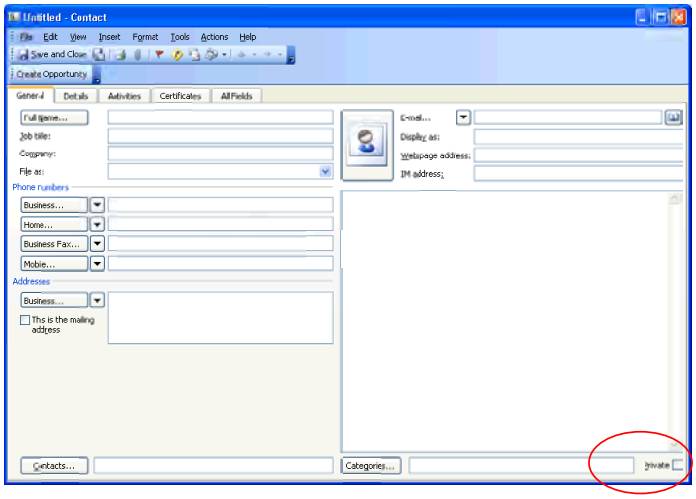
   c. A blank contact item will appear. Fill out the information you have. If you are using categories, you can add it at this time.
   d. Click **Save and Close**.
   e. This new contact will appear in your list of contacts in Contact Manager and it is also saved to your working contact folder in Outlook.

NOTE When creating a contact in Prophet, the contact saves to your Working Contact Folder in Outlook. You can select which contact folder in Outlook is your Working Contact Folder. You can set it to save the contact in a Public Contact Folder or any of your local contact folders. See the Prophet Administrator section of the User Guide to find detailed instructions on setting this up.

2. Add a new contact directly in your Outlook contact folder
   a. In Outlook, click on the contact folder you wish to add the contact to.
   b. Click the **New** button in the upper left hand corner.
   c. A blank contact item displays.
   d. Fill out the information you have for the contact. If you are using categories you can add it at this time.
   e. Click **Save and Close** in the Contact Item.
   f. The contact you just created will appear in Contact Manager if the Contact Manager is pointed to that specific folder in Outlook.

Keep personal contacts out of Prophet.

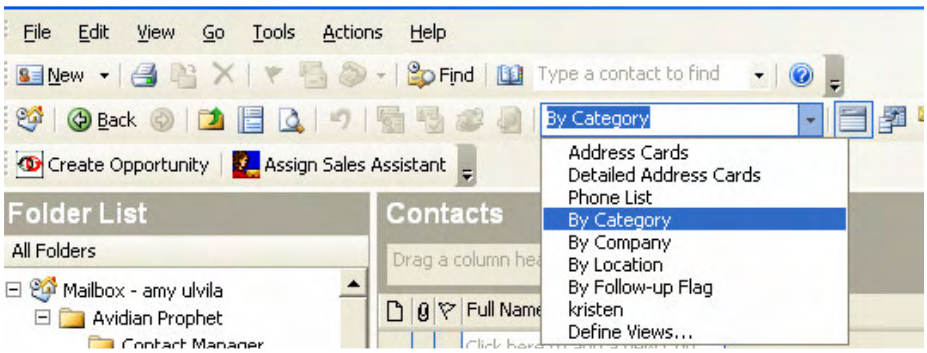
If you want to create a contact in Outlook, but don't want the contact to carry over into Prophet, you can check the private box in the Outlook contact form.



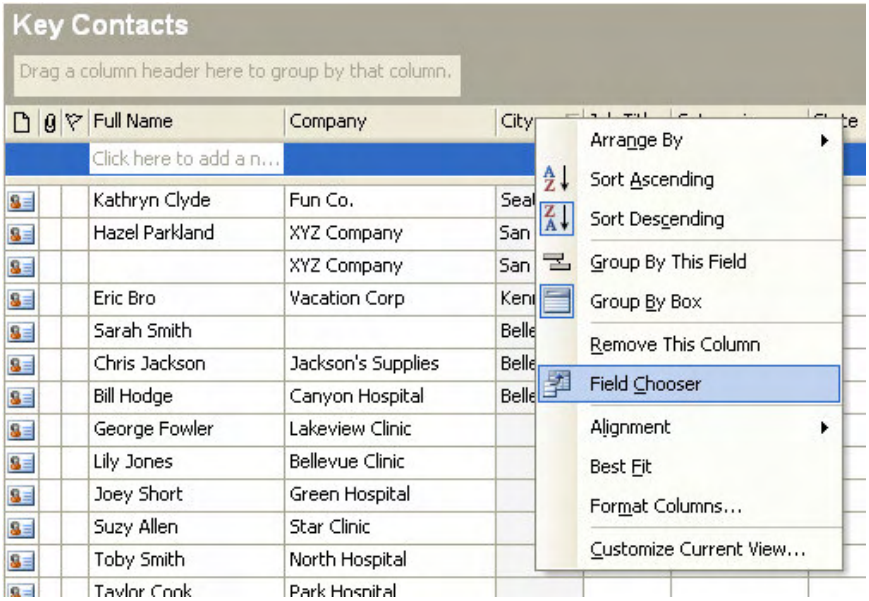
To keep a contact out of the Prophet, check the private box on the contact record. You will see this contact in Outlook but not in Prophet.

Mark a group of contacts private at one time

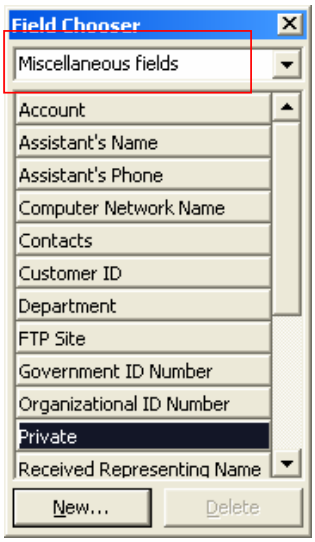
1. In your Outlook Contact folder, click on the **View** menu, select **Toolbars**.
2. Make sure Standard and Advanced are selected.
3. Select either the **Phone list** view or the **By Category** view.



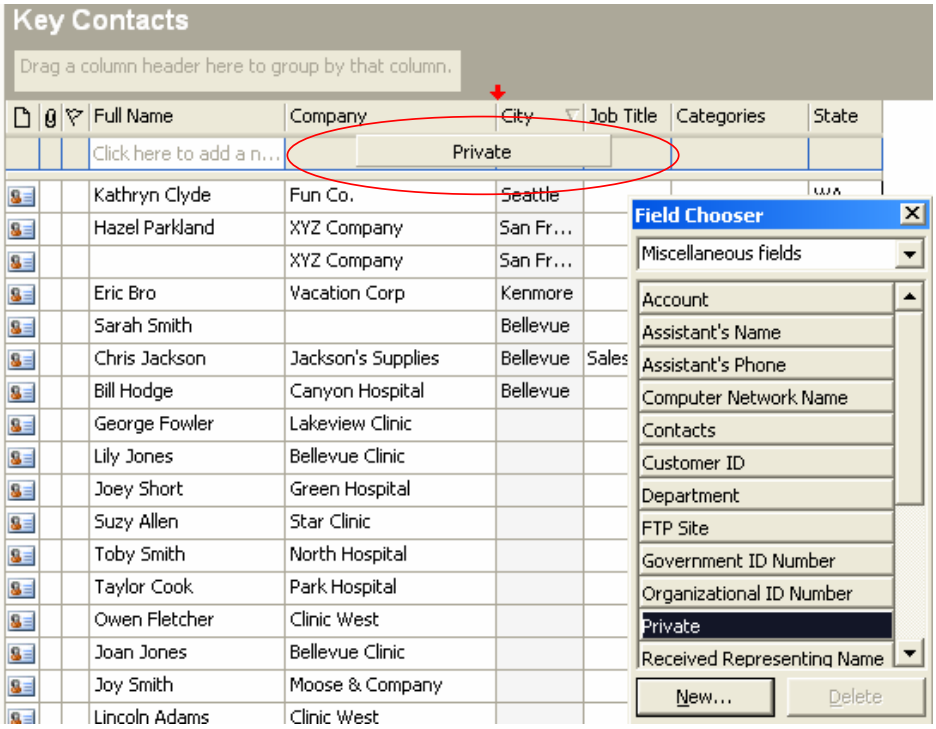
4. Right click on the column header and select **Field Chooser**.



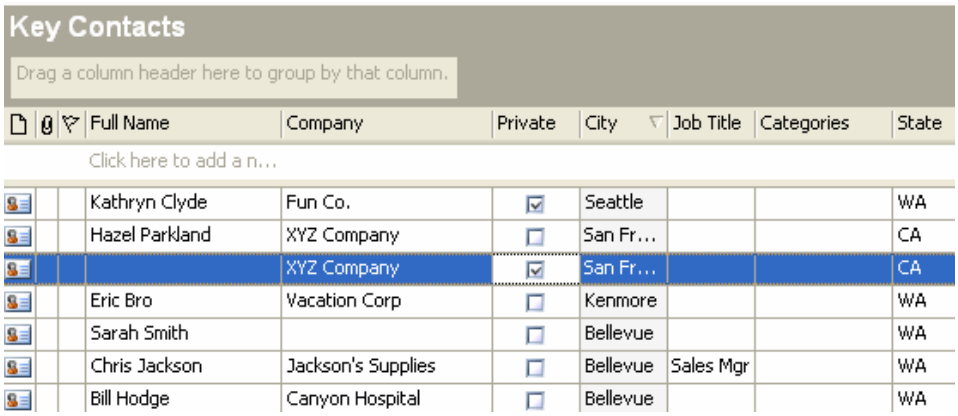
5. Select **Miscellaneous** from the Field Chooser drop down.



6. Click on the **Private** field in the listing and drag it to the column header in your contact listing.



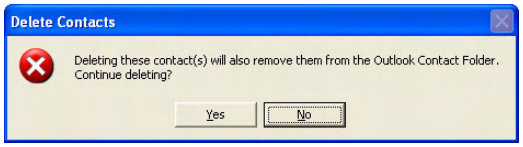
7. One of the columns now showing in your listing is the **Private** field. Scroll through your list of contacts, checking the private box as needed.



8. The contacts you mark private will not carry over into Prophet.

Deleting a contact in Contact Manager

1. Working from Contact Manager
   a. Right click on the contact record you wish to delete
   b. Select **Delete Contact** from the list.
   c. You will get a warning screen that reminds you that removing the contact from contact manager will also delete it from your Outlook contact folder.



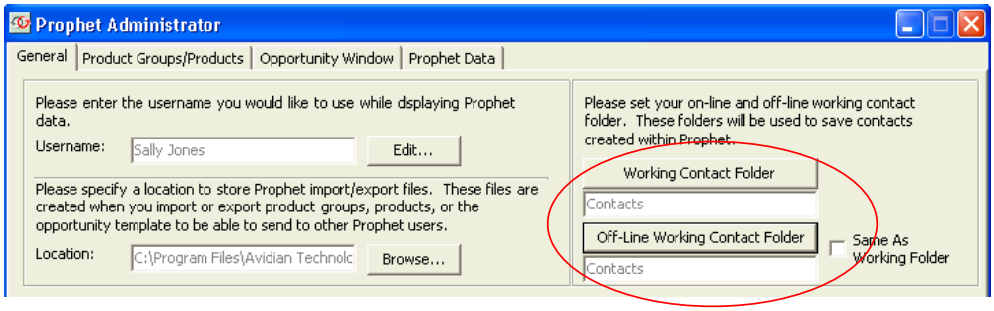
   d. Click **Yes** and the contact will be deleted.

NOTE If you delete a contact in your Outlook contact folder, the contact will remain in Contact Manager. You will have to delete the name in Contact Manager for the contact to be removed from your listing in Prophet.

SETTING WORKING CONTACT FOLDERS

Prophet defaults to save all contacts created in Prophet to the folder you selected during your installation process. If you use a public folder or a subfolder for your contact data rather than your main contact folder, you can change the working contact folder.

1. Click on Contact Manger.
2. Click on the **Tools** button.
3. In the General tab, Click on the **Working Contact Folder** button.
4. Select from your folder list the contact folder you want your contacts to save to.


Prophet Administrator
General
Product Groups/Products
Opportunity Window
Prophet Data
Please enter the username you would like to use while dsplaying Prophet data.
Username:
Sally Jones
Edit...
Please specify a location to store Prophet import/export files. These files are created when you import or export product groups, products, or the opportunity template to be able to send to other Prophet users.
Location:
C:\Program Files\Avidian Technolc
Browse...
Please set your on-line and off-line working contact folder. These folders will be used to save contacts created within Prophet.
Working Contact Folder
Contacts
Off-Line Working Contact Folder
Same As Working Folder
Contacts

Once you changed your working contact folder, when you create a contact in Prophet, the contact will be saved in the contact folder you selected as your Working Contact Folder.

The Off-Line Working Contact Folder allows you to select a default contact folder you would like contacts to save to while you are off-line. If when working offline you need to save contacts to an offline public contact folder in your Favorites folder, this is where you would set it.

SCROLLING THROUGH YOUR CONTACT LIST

There are several ways to move through your list of contacts.

1. Use the horizontal scrollbar under the list of contacts.
2. Use the buttons on the right side of the list of contacts.
3. Click on a name in the list and start typing the name you wish to move to on your keyboard and your cursor will move to the name you are typing.

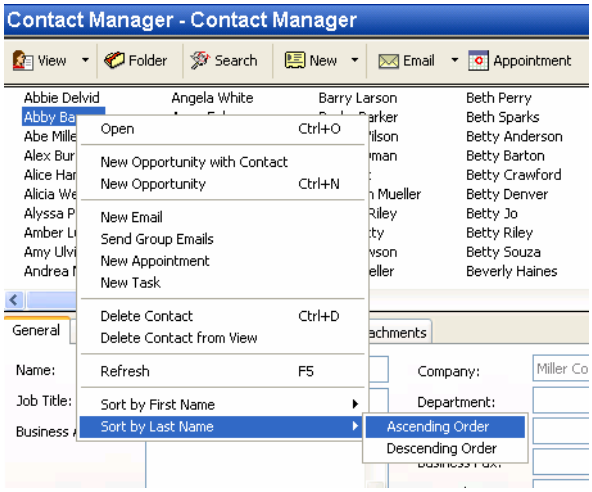
If you need to highlight multiple names, hold down the Control key and click on contacts to add specific contacts, or hold the Shift key and click to select groups of contacts.

Use can also use the "Search" button in the toolbar to look up contact items. Please see the Prophet Search section of the User Guide for details.

VIEWING CONTACTS SORTED BY FIRST OR LAST NAME

In Contact Manager, your contacts are sorted by first name. If you prefer, you can view your contacts sorted by last name. The sort can be set for ascending or descending order.

1. Right click on any name in the list.
2. Select **Sort by Last Name**.
3. Select either Ascending or Descending order.



SHARING CONTACTS WITH OTHER PROPHET USERS

Sharing contacts using Prophet Server

For companies working with the Prophet Server installed, Prophet Users have the option of viewing contacts saved on their own machine or the option to view all contacts saved on the Prophet server. For users where Prophet is installed and connected to the server, all contacts on their machine will be saved to the Prophet Server, unless the contacts are marked private. These contacts are available for all users connected to the Prophet Server to view. These contacts aren't downloaded to the individual computers so they are not available to edit unless they are saved locally as well.

To view all contacts saved on the Prophet Server (Prophet Professional Edition)

1. Click on Contact Manager.
2. Click on the **Folder** button in the toolbar.
3. Check the box next to **View All Server Data.**
4. Click **OK**.
5. Your Contact manager will be populated with a viewable copy of all contacts saved on the Prophet Server.

NOTE If two users have the same contact saved on their own computers, the Prophet Server will pull both contacts onto the server. The Prophet Server will now have two contact records for that same contact.

NOTE To keep a contact saved in Outlook out of Prophet, mark the Private check box in the Outlook contact form. This will keep the contact in your contact folder and it will not carry over into Prophet, and it won't be saved on the Prophet Server.

To view contacts on the Prophet Server (Prophet Enterprise Edition)

1. Click on Contact Manager.
2. Click on the **Folder** button in the toolbar.
3. Click on the **Account Reps** tab in the **'Folders'** Window.
4. You will see a listing of all the Prophet Users in your permission group. (See the Prophet Administrator section of the User Guide to learn about setting up permission groups)
5. Check the Account Rep names you want to view contacts for.
6. Click **OK**.

Sharing contacts using Public Contact Folders

For companies with a Microsoft Exchange Server, a public contact folder is available to share contact information. A public contact folder can be created and all users in your group would be able to view this contact folder in their folder list in Outlook. All members of the group could add and modify contacts. You would all be working from the same contact folder in Outlook.

The Prophet Contact Manager can point to any Outlook contact folder, including Public Contact Folders. For groups that need to be able to share contacts as well as modify the contacts, using a public contact folder works well.

Once a public contact folder is created, you can point the Contact Manager to read contacts in the public folder.

1. Click on **Contact Manager**.
2. Click on the **Folder** button.
3. Check **Show Public Folders**.

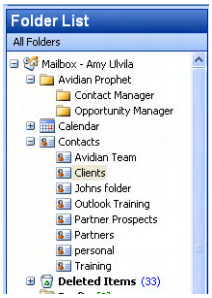
4. Your folder list will expand and show you all your public contact folders as well as your local folders.
5. Check the public folder you wish to work with. Make sure you uncheck your personal contact folder.
6. Click **OK**.

You will then want to set the public contact folder as your Working Contact Folder. See instructions in the User Guide about setting up your Working Contact Folder.

CREATING GROUPS FOR YOUR CONTACTS

Groups using folders

When you install Prophet 4.0, you will be asked to select which contact folder in Outlook you want to work with. This is your Working Contact Folder. The contacts that are displayed in Contact Manager are those from contact folder you selected during installation. In Outlook, you can create contact subfolders to help organize your contacts into specific groups.



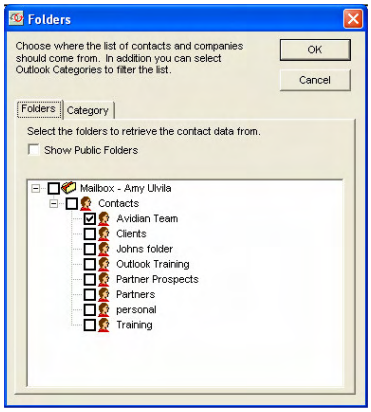
Subfolders were created in outlook to create groups for specific contact.

To create a contact subfolder in outlook

1. Right click on your main contact folder.
2. Select **New Folder.**
3. Name the folder and click **OK**.

After the subfolders are created in Outlook, you can access them through Contact Manager.

1. Open Contact Manager.
2. Click on the **Folder** button.



To view a specific subfolder in contact manager, put a check next to the folder (s) you wish to view. Click **OK.**

If you have an Exchange Server, you can also access your public contact folders by checking the Show Public Folders box. The folder list will now expand to show you your public contact folders. Check the folder you wish to view.

The Folder window will open up. In the folder tab you will see your Contact Folder Tree. To display a group of contacts, select the checkbox for the folder(s) you wish to see and click OK. You can display a single folder or several folders.

Examples of different folder lists:

A Specific Call List
Prospect List
Client List
Customers in a certain region

Groups using categories

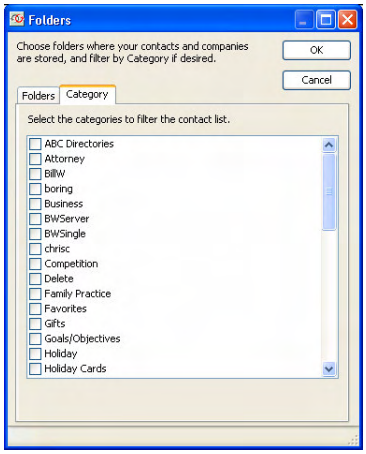
You can start to create groups for your contacts by using categories as well.

How to add a category to a contact:

1. Open up a Contact Item.
2. Click on the **Category** button in the lower right hand corner.
3. Outlook has a list of standard categories to choose from. To add another category, click on the **Master Category List**, type in your new category and click **Add**. It will now be listed in the **Available Category** list.
4. To assign a category to a contact, put a check mark in the box next to the category.
5. Click **OK.**
6. Save and close the contact. The contact is now assigned to the specific category you checked.

How to view a specific category of contacts

1. In Contact Manager, click on the **Folder** button.
2. Click on the **Category** tab.
3. Select the category you wish to work with. You can check more than one category. Click **OK**.
4. The Contact Manager will now be populated with the contacts assigned to the category you are filtering by.
5. The Contact Manager will display this specific category until you click on the folder button again and uncheck the category you selected.



Select the category you would like to view.

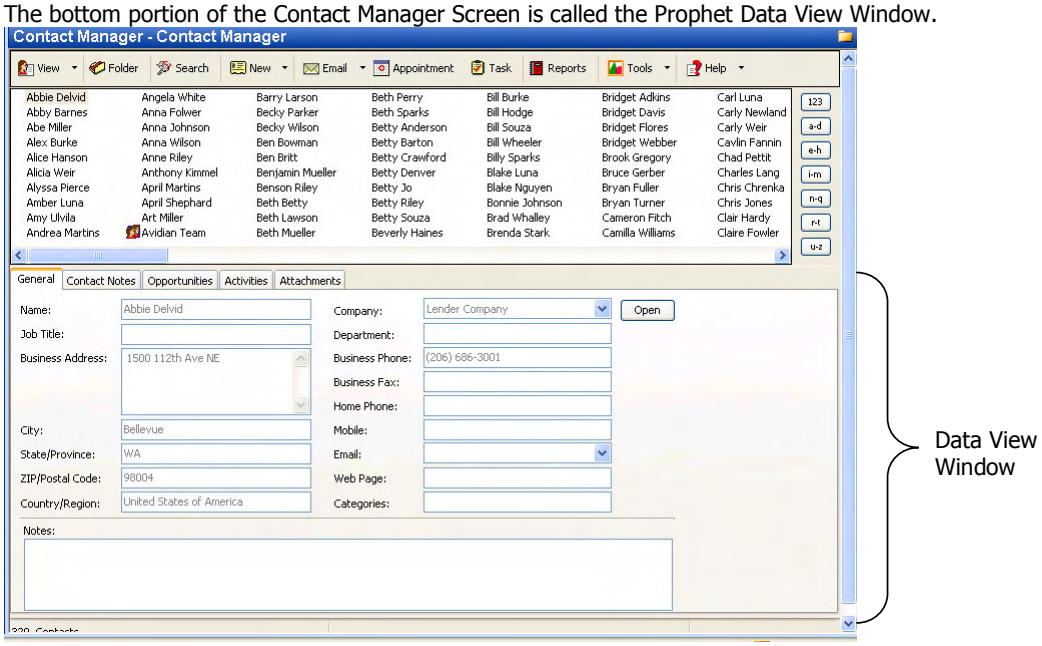
Push OK

How to delete a category from Prophet

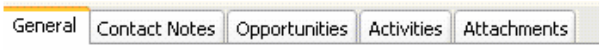
1. Remove the category from all contacts.
2. Click on the **Folder** button in Contact Manager.
3. Click on the **Category** Tab
4. Highlight the category you wish to delete.
5. Right click on the Highlighted category and select **Delete.**

VIEWING DATA FOR YOUR CONTACT RECORDS

The bottom portion of the Contact Manager Screen is called the Prophet Data View Window.



The Prophet Data Window introduces five new tabs for managing your contacts.

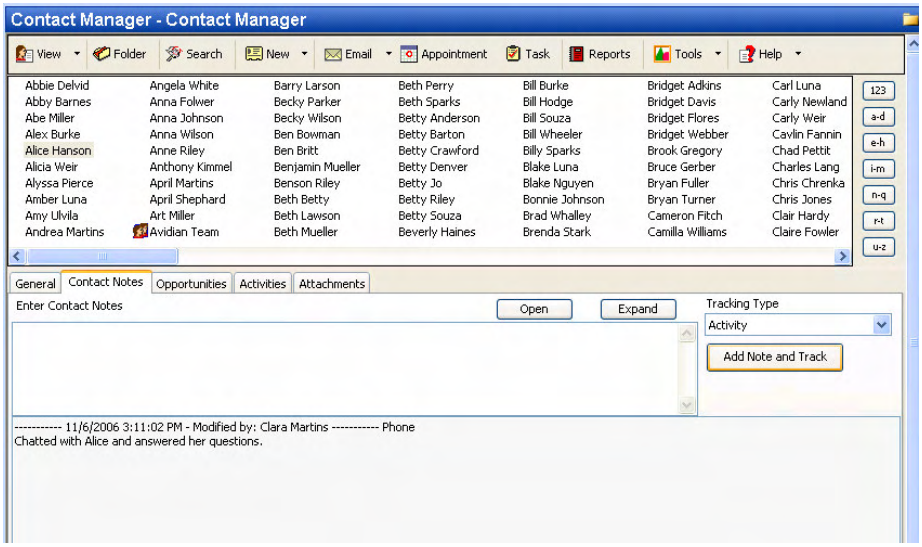


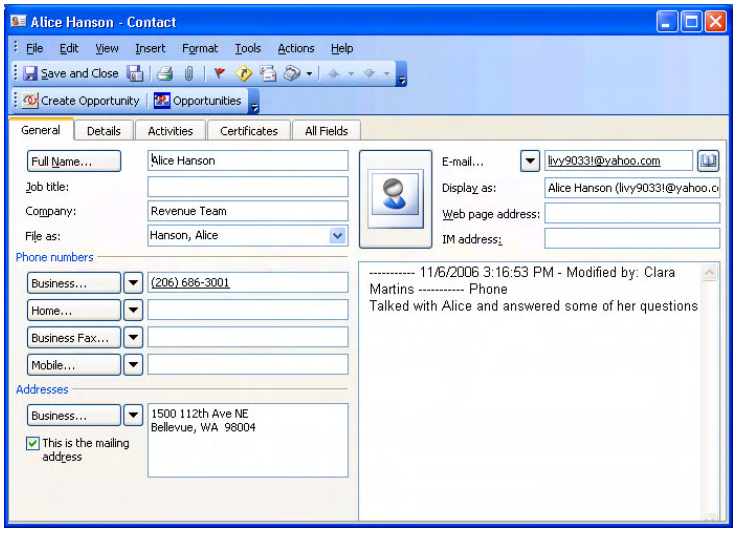
General – The General tab displays all critical contact information for a selected contact or company. You can quickly view companies or contacts without opening and closing the contact or company windows. The General tab is different when viewing a contact vs. a company:

A Contact's General tab. The fields on this tab are the same fields that appears on the Outlook Contact General tab. Double click on the contact name to open the Contact Item. The texts in these fields are displayed in grey as a visual indicator that the fields are view-only. The Prophet Data View General tab has a drop-down arrow adjacent to the company name because Prophet allows contacts to be associated with more than one company.

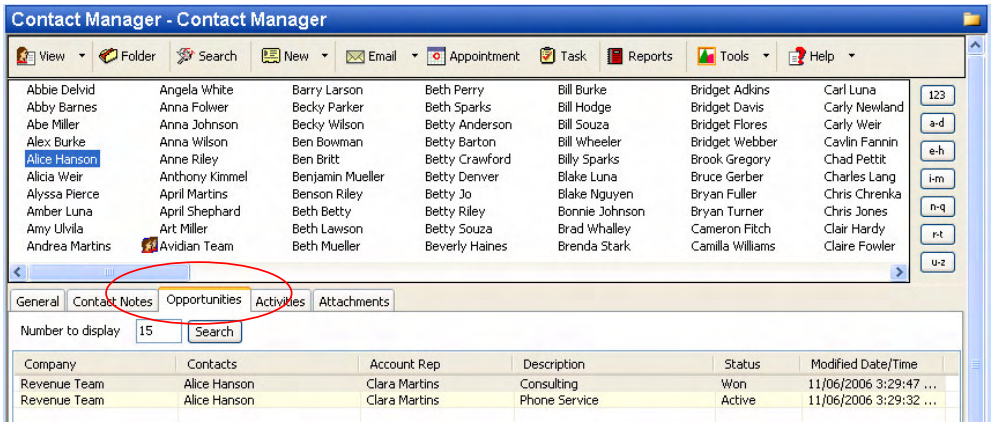
Contact Notes- The Contact Notes tab will display any notes taken in the Contact Item Notes section, but Prophet adds the ability to add a time and date stamped note. To enter a time and date stamped note for a contact item, follow these steps.

1. Highlight a contact name in Contact Manager.
2. Click on the **Contact Notes** tab in the Data Window.
3. Type your notes in the '**Enter Contact Notes**' field in the Contact Notes tab.
4. When you are finished typing your notes, select what type of note you are adding from the **Tracking Type** drop down field to the right.
5. Click the **Add Note and Track** button.
6. The notes will be time, date and user stamped and will be moved to the Notes section of the contact item. When you open the contact item, you will also see the time and date stamped notes.



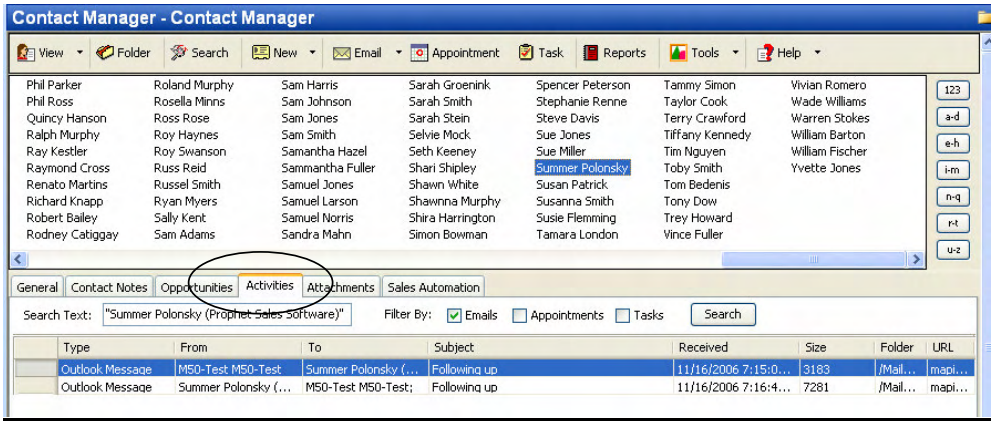


Opportunities – The Opportunities tab allows the user to track sales opportunities and history at the company or contact level. By highlighting a name in the list view and clicking the Search button, all opportunities associated with that name will be displayed. A maximum of 15 opportunities is the default, but you can enter any quantity in the 'Number to Display' box. You can search for opportunities associated with the highlighted contact or company name, or multiple names highlighted.



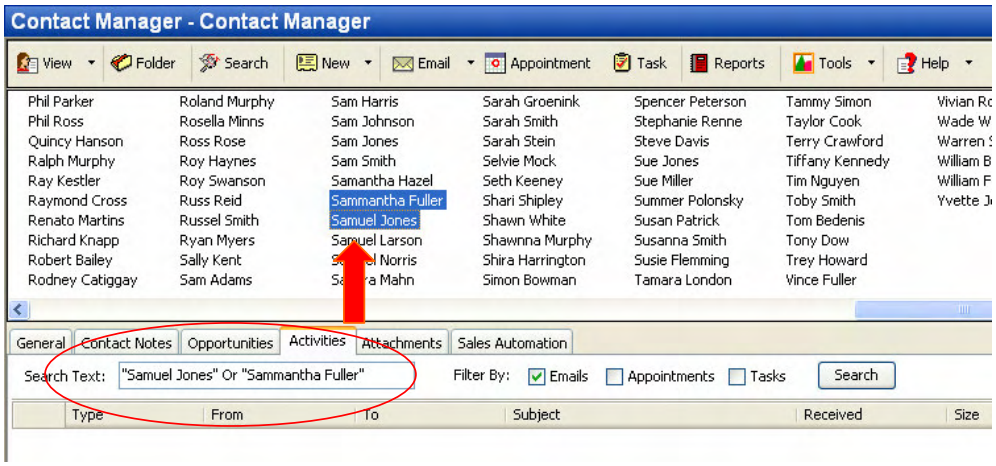
1. From Contact Manager, highlight the contact(s) who you wish to view opportunities for.
2. Click on the **Opportunities** tab in the Data View Window.
3. Click **Search.**
4. The opportunities associated with the contact(s) you have highlighted will show in the Opportunity tab.
5. Double click on the Opportunity you wish to view.
6. The Opportunity Window will display.

Activities – You can search for all Emails, Appointments or Tasks for a contact you have highlighted.



1. To Search for Emails associated with a contact, highlight the contact name, click the **Activities** tab, check the Filter By **Email** box and click **Search**.
2. To Search for Appointments associated with a contact, highlight the contact name, click the **Activities** tab, check the Filter By **Appointment** box and click **Search**.
3. To Search for Tasks associated with a contact, highlight the contact name, click the **Activities** tab, check the Filter By **Tasks** box and click **Search**.
4. If you do not select a Filter and click the **Search** button, Prophet will search your Desktop, My Documents and Mail for the name highlighted. To learn more about Prophet Search, please read the Prophet Search section of the user guide.

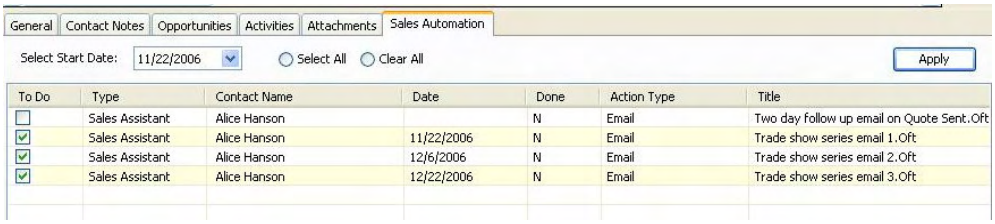
You can search for activities associated with more than one contact if you click on one name, hold down ctrl key and continue to click on contact names. In the Activities tab you will see the 'Search Text' field populate with both names and search for Emails, Appointments or Tasks associated with both of the contacts.



Sales Automation- (*This is a feature for Prophet Professional and Enterprise Users only*)

The Prophet Sales Assistant allows you to create emails messages, set up appointments and create tasks for contacts based on the actions you have defined in the Sales Assistant tool. You can set up the Sales Assistant to send carefully timed emails to your contacts, or to start creating tasks automatically to remind yourself to make follow up phone calls. The Sales Automation tab in Contact Manager will show you all the Sales Assistant Items that are available to assign to your contacts, what has been processed for the contact and what is set to process in the future.

For more information on setting up and using the Sales Assistant, please view the portion of the user guide dedicated to the Sales Assistant.

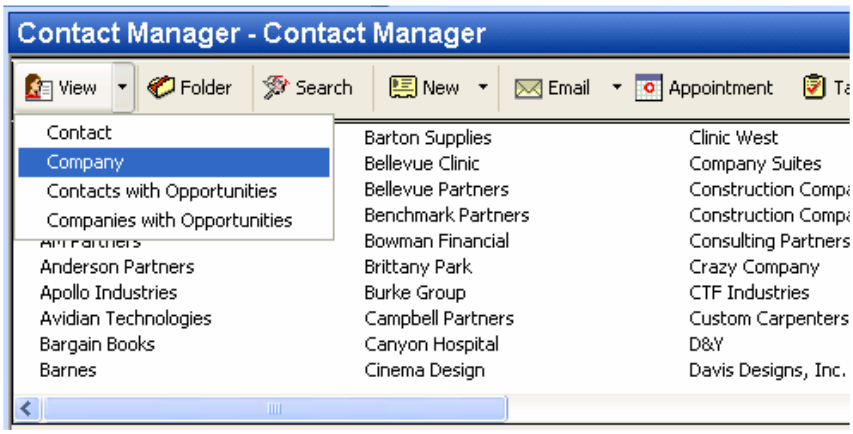


COMPANY RECORDS

VIEWING COMPANY RECORDS IN CONTACT MANAGER

In Prophet Contact Manager you have the option of viewing your list of companies.
To access your company list:

1. Click on the arrow to the right of the **View** button.
2. Select **Company**.



Contact Manager will now list out all of your company records alphabetically.

SCROLLING THROUGH YOUR COMPANY LIST

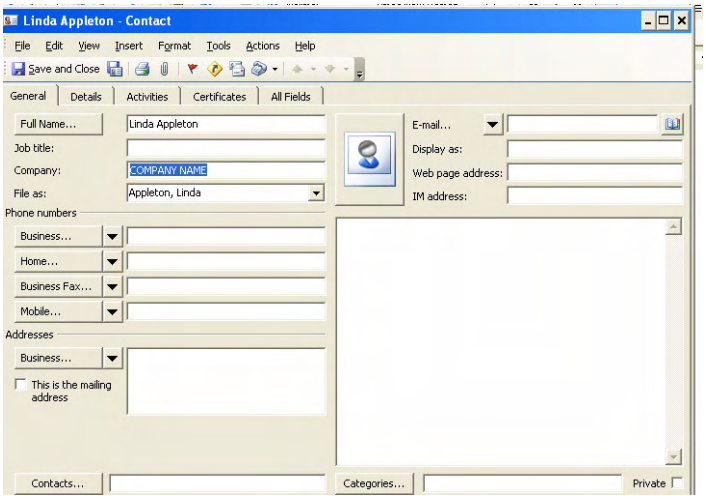
There are a couple ways to move through your list of companies.

4. Use the bar under the Companies.
5. Use the buttons on the right and they will bring you to the letter you click on.
6. Click on a name in the list and start typing the name you wish to move to. Your cursor will move to the letters you type on your keyboard.

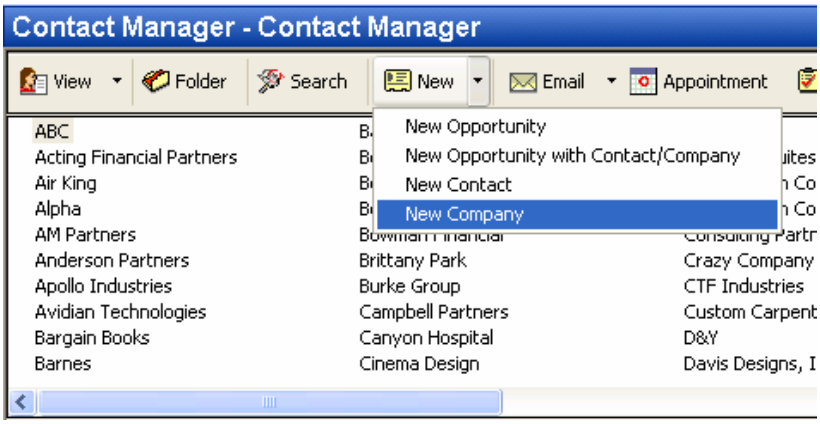
CREATING A COMPANY RECORD

There are two ways a new company record is created

1. Creating company record through the Outlook contact form. When you create a new contact record and fill in the **Company** text field in the Contact Item, a company record is automatically created in Prophet.



2. You can create a new company record by using the **New** button in the Contact Manager toolbar.
   a. Click on the arrow to the right of the **New** button in the toolbar
   b. Select **New Company** from the list.



   c. A blank company record will appear and you can fill out the information you have for the company.
   d. Click **Save and Close** and the company record you just created will appear in your alphabetical listing of companies in the Contact Manager.

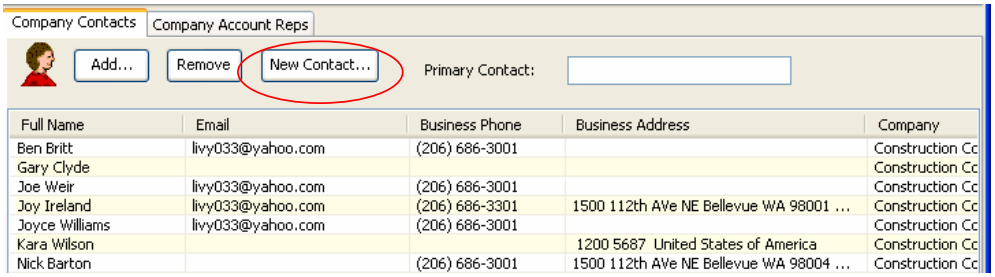
ASSOCIATING CONTACTS WITH A COMPANY

There are two ways contacts are tied to a company record.

1. Contacts tied to a company by the way the company name is filled out in the contact record.

   When you create a new contact, the way in which you fill out the Company field in the Contact Item will determine what Company Record the contact is tied to. If you spell the company name the same way it is spelled in the company record, the contact will automatically be tied to the company record.

   By using the **New Contact** button in the Company record, the spelling of the company will auto-populate the Contact Item with the same spelling as in the Company Record. The new Contact Item created this way will be tied to the Company Record it was created in the next time Prophet refreshes.



If you have several contacts from the same company and you aren't consistent with the way you spell the company name, you will have several company records all with different spellings. Being consistent with the way you are spelling the company name will tie all the contacts at that company together.

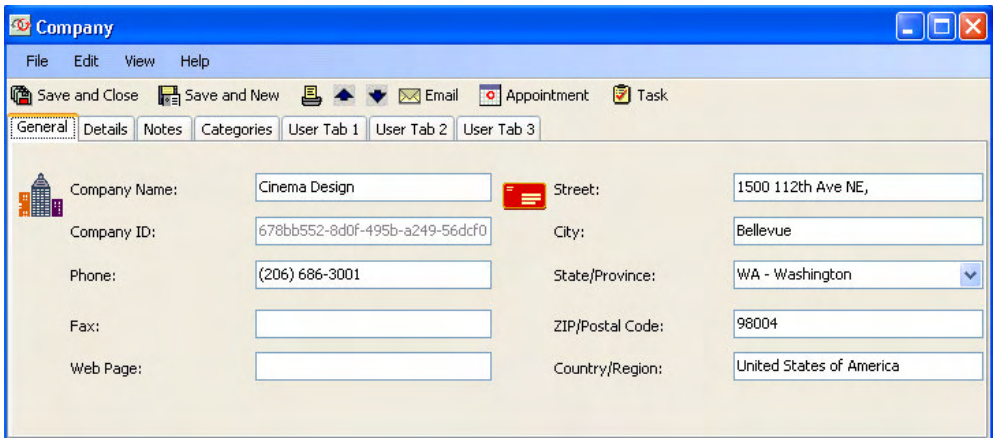
2. Contact manually associated to a company record with the **Add** button.

   You may want to associate contacts to the company record that don't work directly at the company. They could be consultants or influencers. To associate a contact you already have created to a Company Record, use the **Add** button in the company record. This allows you to select from your list of contacts. Check the name you want to associate and click **OK**.

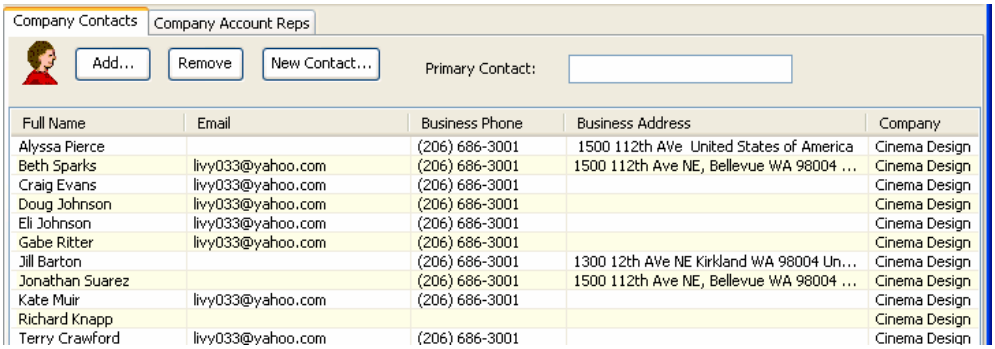
WHAT IS INCLUDED IN THE COMPANY RECORD

At the top of the company record there are five tabs:

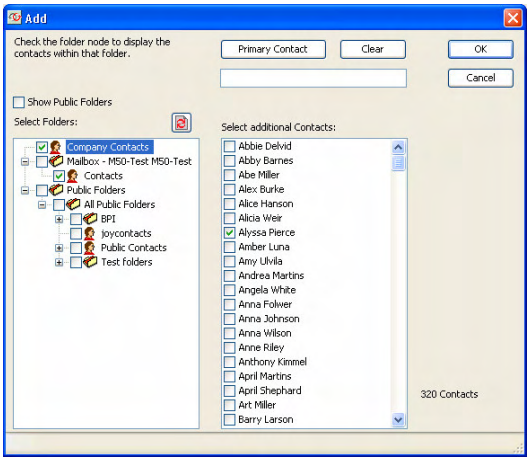
1 **General** Tab lists the Company Name, Phone, Fax, Website, Address
2 **Details** Tab gives you the option to type in an alternative shipping address
3 **Notes** Tab allows you to type in any notes for the Company.
4 **Categories** tab allows you to assign the company record to a category.
5 User Tab 1, 2 and 3 are tabs for you to gather custom information. You can customize this tab through the Prophet Administrator. Please see the section for Prophet Administrator for instructions on customizing this tab.



At the bottom of the company record there are two tabs:


Company Contacts
Company Account Reps
Add...
Remove
New Contact...
Primary Contact:
Full Name
Email
Business Phone
Business Address
Company
Alyssa Pierce (206) 686-3001 1500 112th AVe United States of America Cinema Design
Beth Sparks livy033@yahoo.com (206) 686-3001 1500 112th Ave NE, Bellevue WA 98004 ... Cinema Design
Craig Evans livy033@yahoo.com (206) 686-3001 Cinema Design
Doug Johnson livy033@yahoo.com (206) 686-3001 Cinema Design
Eli Johnson livy033@yahoo.com (206) 686-3001 Cinema Design
Gabe Ritter livy033@yahoo.com (206) 686-3001 Cinema Design
Jill Barton (206) 686-3001 1300 12th AVe NE Kirkland WA 98004 Un... Cinema Design
Jonathan Suarez (206) 686-3001 1500 112th Ave NE, Bellevue WA 98004 ... Cinema Design
Kate Muir livy033@yahoo.com (206) 686-3001 Cinema Design
Richard Knapp Cinema Design
Terry Crawford livy033@yahoo.com (206) 686-3001 Cinema Design

1. **Company Contacts**. You can associate your contacts with your company records.
   a. Add an existing contact to the company record
      i. Click **Add**
      ii. On the screen that comes up, put a check next to the name you want to associate with the company.
      iii. If you want this contact to be the primary contact, click the **Primary Contact** button at the top of the window.
      iv. Click **OK.**



   b. Create a new contact and add them to the company
      i. Click the **New Contact** button in the Company Contact tab.
      ii. A new Contact Item displays. It will have the company information already populated. Type in the contact name and email address and any additional information.

iii. Click **Save and Close** in the Contact Item.
iv. **Save and Close** the Company Record
v. The next time you open the Company Record up, the new contact will be listed under the Company Contacts tab.

2. Company Account Reps- you can keep track of which Account Rep at your company is working with this Client.
   a. Click on the **Add** button in the Company Account Reps tab.
   b. Select from your list of contacts who you want to associate as the Account Rep.
   c. If they are the primary account rep, click Primary Account Rep.
   d. Click **OK**
   e. The name will now be listed as a Company Account Rep.

VIEWING CATEGORIES OF COMPANIES

You can assign Categories to your Company Records.

1. In Contact Manager go to your Company View.
2. Double click on the Company you would like to assign to a category.
3. Click on the **Categories** tab inside the company record.
4. Check the category you would like to assign the record to.
5. Click **Save and Close** in the Company Record.

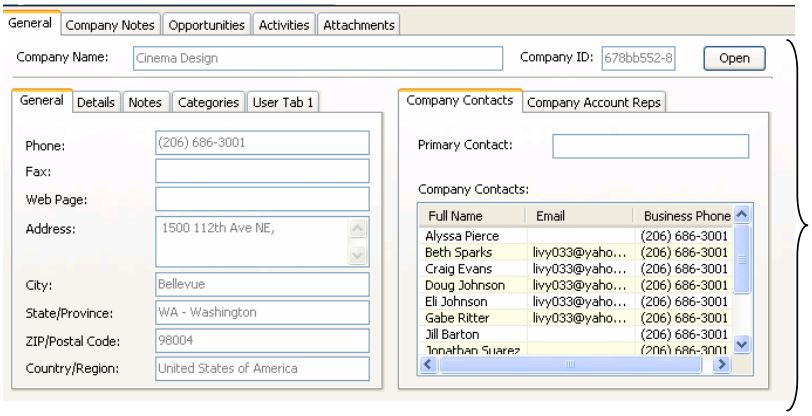
You can then filter your Company List by Category.

1. Go to Contact Manger, Company view.
2. Click on the folder button
3. Click on the **Category** tab
4. Check the category you wish to filter by.
5. Select **OK**.

VIEWING DATA FOR COMPANY RECORDS

Just as you could search for general information, opportunities, emails, appointments, tasks and attachments around Contacts in the Contact Manager, you can also search on Companies.

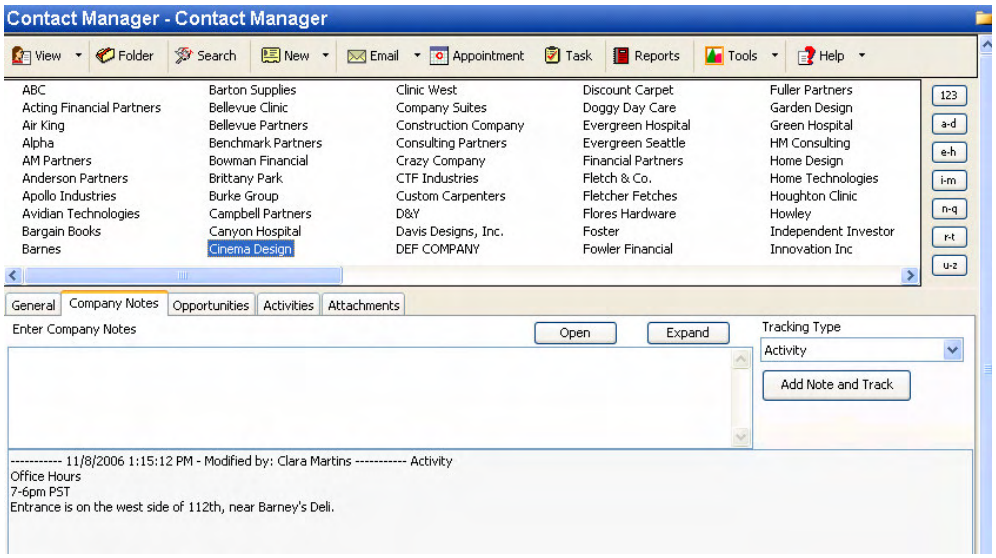
A Company's General tab. The Company General tab displays the company name and company ID, and follows with data in sub-tab groupings. The General tab has company contact data; the Details tab has shipping account and address data; a Notes tab provides a text box for making notes; and the Categories tab lists all categories the company belongs to. The Company Contacts tab lists all contacts that have been added to this company, and the Company Account Reps tab displays any contacts added as Account Reps.



The information you see on the general tab is what you see in the company record when you open it up.

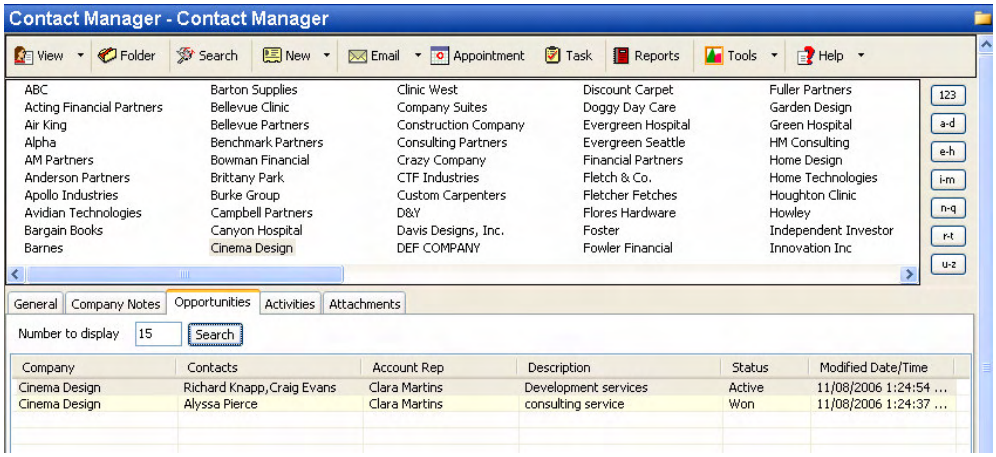
Company Notes The Company Notes tab will display any notes taken in the Company Record Notes section. You have the ability to add a time and date stamped note. To enter a time and date stamped note for a company record, follow these steps.

7. Highlight a Company name in Contact Manager.
8. Click on the **Company Notes** tab in the Data Window.
9. Type your notes in the '**Enter Company Notes**' field in the Company Notes tab.
10. When you are finished typing your notes, select what type of note you are adding from the **Tracking Type** drop down field to the right.
11. Click the **Add Note and Track** button.
12. The notes will be time, date and user stamped and will be moved to the note section of the company record.



Company's Opportunities
The Opportunities tab allows the user to track sales opportunities and history at the company level. By highlighting a company name in the list view, selecting the Opportunities tab and clicking search, all opportunities associated with that company will be displayed. A maximum of 15 opportunities is the default, but you can enter any quantity in the 'Number to display' box.

1. Highlight a Company Name or multiple Company Names
2. Click on the **Opportunities** Tab
3. Click **Search.**
4. All opportunities associated with the company(s) you have highlighted will be displayed. Double click to open the specific Opportunity.



Activities
You can search for all Emails, Appointments or Tasks for a Company you have highlighted.

1. To Search for Emails associated with a Company, highlight the Company Name, click the **Activities** tab, check the Filter By **Email** box and click **Search**.
2. To Search for Appointments associated with a Company, highlight the Company Name, click the **Activities** tab, check the Filter By **Appointment** box and click **Search**.
3. To Search for Tasks associated with a contact, highlight the contact name, click the **Activities** tab, check the Filter By **Tasks** box and click **Search**.
4. If you do not select a Filter and click the **Search** button, Prophet will search your Desktop, My Documents and Mail for all Contacts associated with the Company Record highlighted. To learn more about Prophet Search, please read the Prophet Search section of the user guide.

Sales Automation- (*This is a feature for Prophet Professional and Enterprise Users only*)

The Prophet Sales Assistant allows you to create emails messages, set up appointments and create tasks for contacts based on the actions you have defined in the Sales Assistant tool. You can set up the Sales Assistant to send carefully timed emails to your contacts, or to start creating tasks automatically to remind yourself to make follow up phone calls. The Sales Automation tab in Contact Manager will show you all the Sales Assistant Items that are available to assign to your contacts, what has been processed for the contact and what is set to process in the future.

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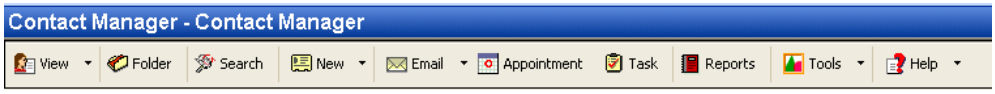
CONTACT MANAGER TOOLBAR



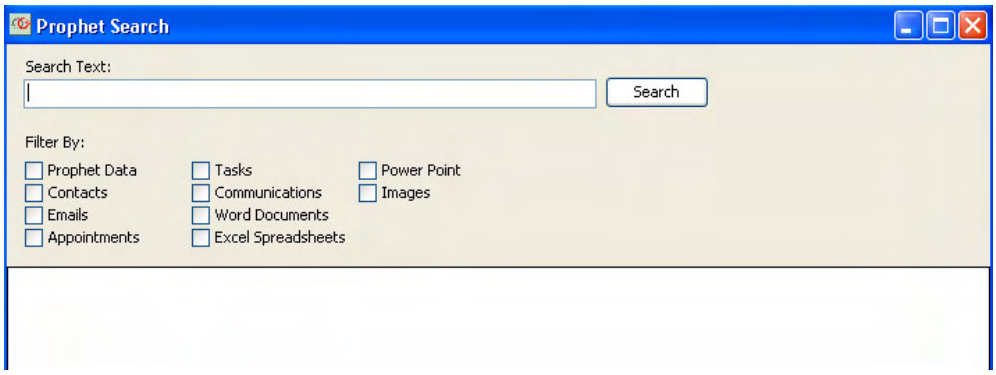
View button drop-down list
Under the View button you have 4 options for viewing your contact manager

1. Contact view
2. Company view
3. Contacts with Opportunities
4. Companies with Opportunities

NOTE The last view, either by Contact, Company, Contacts with Opportunities, or Companies with Opportunities will be saved as the view you see when you open up Contact Manager again.

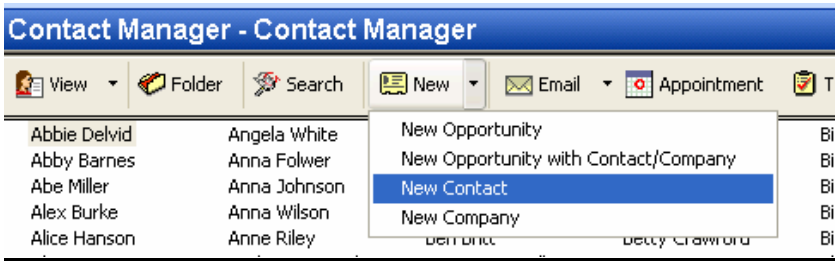
Folder button
The Folder button allows you to access the Contact Manager to different Outlook contact folders and to filter your contacts by category. Please refer to the Contact Manager section of the User Guide.

Search button
Clicking the Search button in the Contact Manager Toolbar launches the Prophet Search window. For information about Prophet Search, please see the Prophet Search section of the User Guide.

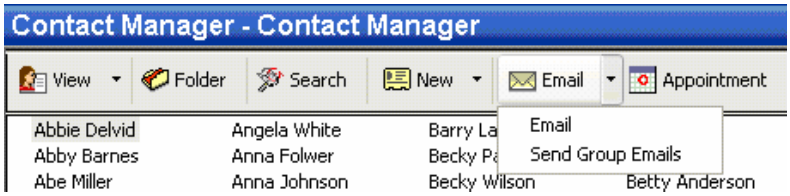


New Button drop-down list
Under the New button you have 4 options.

1. Create a New Opportunity
2. Create a New Opportunity with Contact/Company
3. Create a New Contact
4. Create a New Company record



The Email drop-down list allows you to send a standard email or a group email.



Send a standard email

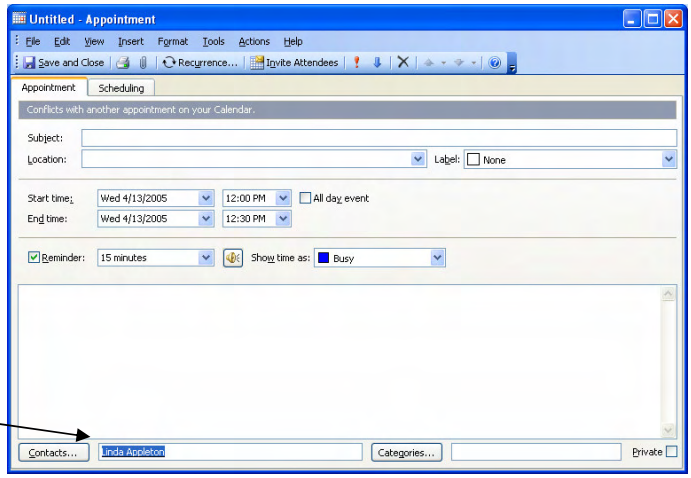
1. Highlight contact name(s) or company name that you want to email. To select multiple contact or company name(s) from the list view, hold down the Shift or Control key while clicking the names.
2. Click the **Email** button
3. The email addresses will populate the **'To'** field in the email.
4. Compose email and click **Send**.

Send a group email using the group email wizard. See Group Email wizard section of the User Guide.

The Appointment button adds an Outlook appointment to your calendar for the contact(s) or company contacts highlighted in the List View, populating the Contacts field with the contact's names in the Appointment window.

1. Highlight one or more names and click the **Appointment** button
2. The Appointment Item Contacts field will be populated with the highlighted names.
3. Fill out the appointment window, click **Save and Close.**
4. The Appointment will show up on your Outlook calendar, on Prophet Today on the day it is due and you can search for it in Contact Manager by highlighting the contact name and clicking on the Activities tab and searching for Appointments.

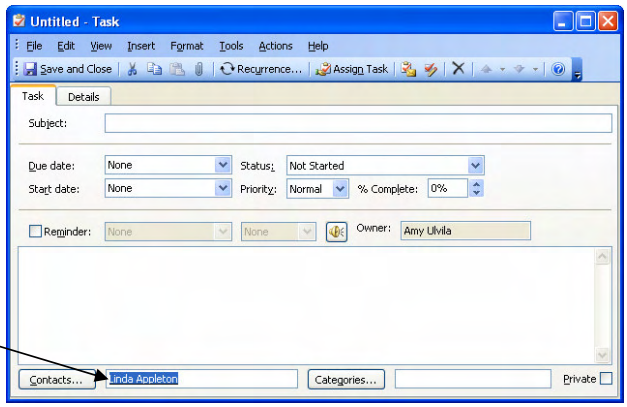
Highlight a contact and click on the appointment button. The name of the contact highlighted will be associated with the appointment in the Contact field as shown here.



The Task button adds an Outlook Task to your Tasks List for the contact's names highlighted in the List View, populating the Contacts field in the Tasks window with the contact's names.

1. In the list view, highlight one or more names and click the **Task** button, opening the Task window.
2. The Task window Contacts field will be populated with the highlighted names.
3. Complete the other Task fields, click **Save and Close**, and it will be added to your Task list.
4. This task will show up on your Outlook task pad, in Prophet Today on the day it is due and you can search for it in contact manager by highlighting the name, selecting the Activities tab and filtering your search by Tasks.

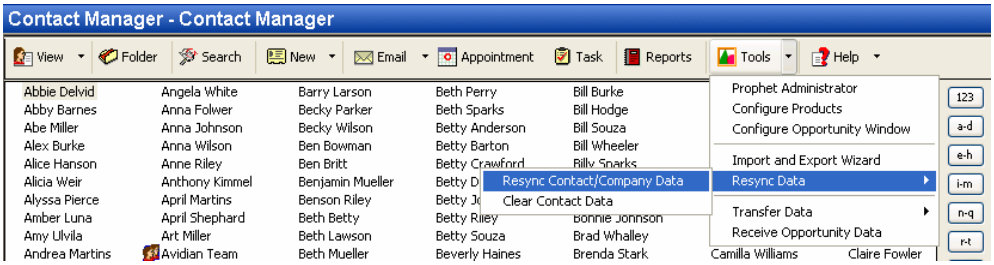
Highlight a contact and click on the task button. The name of the contact highlighted will be associated with the task in the Contact field as shown here.



The Reports button launches the Report Manager. Standard reports can be run, custom reports can be created in the Reports Wizard, graphics modifications can be made to custom reports in the Reports Designer, and other computer's shared data can be remotely viewed in Data Sharing. For more details please read the Reporting section of the User Guide.

The Tools drop-down list
Under the tools button you have the following options:

1. Prophet Administrator to configure the data sharing options.
2. Configure Products, to administrate Products Groups and Products.
3. Configure opportunity Window, to manage and customize the opportunity window. (see Customizing the Opportunity Window portion of the user guide)
4. Import/Export Wizard, to launch the Import and Export Wizard utility.
5. Re-synch Data between Outlook and Prophet
6. Transfer Prophet data to the Prophet Server (for server edition users)
7. Receive Data, to import data received from other users.
8. Open the Sales Automation window (Prophet Professional and Enterprise Versions only)



NOTE Moving contacts between folders in Outlook requires re-synching data in order for Prophet to display the changes. To resync the data, click the arrow next to the Tools button and select **Resync Data, Resync Contact/Company Data**.

SALES ASSISTANT AND WORKFLOW

Sales Assistant

Available with the Prophet Professional & Enterprise Editions

What is the Sales Assistant?
The Prophet Sales Assistant allows you to create emails messages, set up appointments and create tasks for contacts based on the actions you have defined in the Sales Assistant tool. You can set up the Sales Assistant to send carefully timed emails to your contacts, or to start creating tasks automatically to remind yourself to make follow up phone calls.

Setting up Sales Assistant Actions
A Sales Assistant Action can be any of the following:

- An email action. An example is an email that will be sent out 2 weeks after you assign it to a contact.

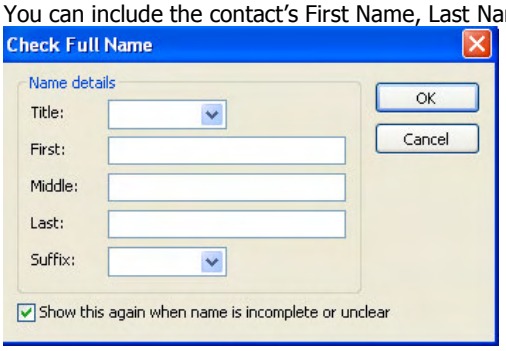
- A task action. An example is a task that will remind you to call a contact 3 weeks after you assign it to a contact.
- An appointment action. An example is an appointment that prompts you to set up a meeting with a contact 15 days after you assign it to the contact.

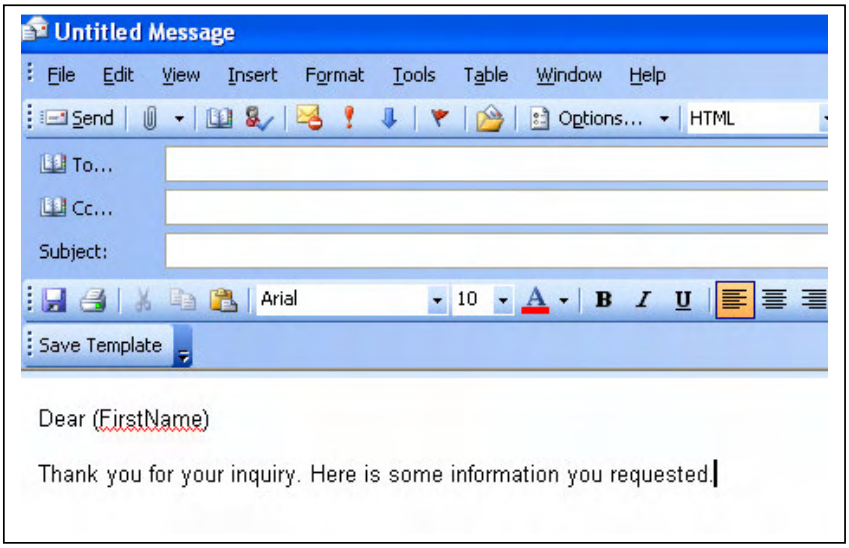
Steps to set up the Sales Assistant

Creating new templates

The first thing you will need to do is to start creating template emails, tasks and appointments to assign to contacts.

1. Make sure you are using the Microsoft Office Word 2003 as your editor
    a. In Outlook, from the Tools menu select options.
    b. Click on the Mail Format Tab
    c. In the Message format section, make sure that the box is checked next to Use Microsoft Office Word 2003 to edit e-mail messages.
    d. Click Apply and OK.
    e. Go back into the Prophet Administrator and select the Prophet Actions tab.
2. In the Opportunity Manager or the Contact manager, click on the **Tools** button.
3. Click on the **Sales Automation** tab.
4. At the top of the Sales Automation Tab in the Template section, click on the **New** button.
5. Fill in the Template Name.
6. Select from the Type drop down if this template is an appointment, email or task.
7. Click **OK**.
8. A new window will appear according to the type of template you selected.
    a. Email type- Compose your email, fill in the subject line and attach any documents. You can include a salutation in the email template if you would like. You can include the contact's First Name, Last Name, Title and Suffix.





hen you process the email, Prophet will populate the contacts first name into the email if you type (FirstName) in the email template. For example, type Dear (FirstName) at the top of the email template. When the email is processed and sent out, the recipient's first name will populate after Dear.

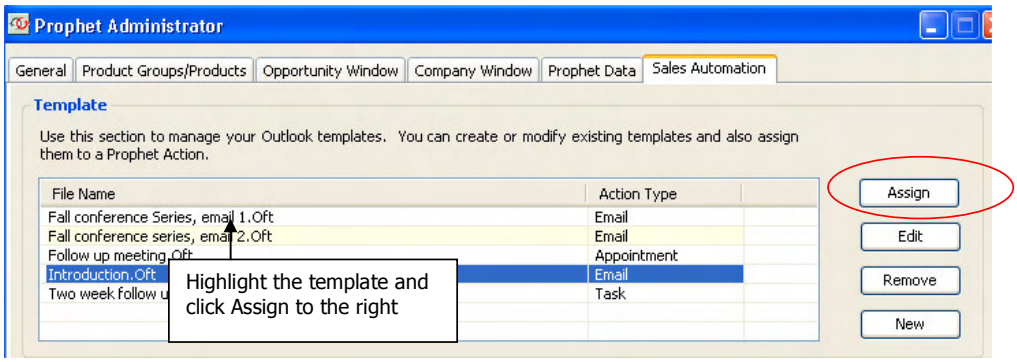
ii. **Last Name**- If you would like to include the recipient's last name as well as their first name use (LastName) in the template. For Example Dear (FirstName) (LastName).
iii. **Title**- If you want the template to include the recipient's title, type (Title) in the template you are creating. When the Sales Assistant Action is processed and the email is sent, in the location you typed (Title), the recipients title will populate the email. For Example Dear (Title). (LastName).
iv. **Suffix**- To include the suffix, type (Suffix). For Example Dear (Title). (LastName) (Suffix). Dear Mr. Smith II

b. Task type- Fill in the task. You do not need to fill in the due date or the start date. The delay date that you set later in the set up process will act as the due date.
c. Appointment type- Fill out the appointment. You do not need to fill in the due date. The delay date that you set later in the set up process will act as the due date.

9. Click the **Save Template** button in the email, appointment or task that you are creating.
10. The template that you saved will appear in your template listing in the Sales Automation tab in the Prophet Administrator.
11. Continue to create templates that you would like to set up as a Sales Assistant Action.

You can start setting up Sales Assistant actions with the templates that you created.

1. Highlight the Template you would like to set up as a Sales Assistant Action.
2. Click on the **Assign** button to the right of the Template portion in the Sales Automation Tab.

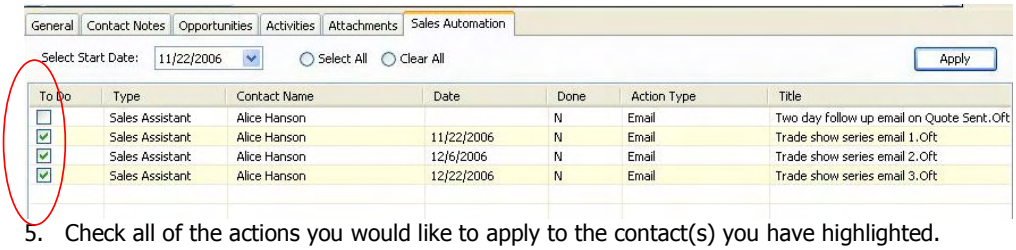


3. In the '**Assign Template to New Action**' window that displays, under Step 1 select **Assign Sales Assistant Action**.
4. You can change the title of the action if you would like (ie, introduction email, 2 week follow up email, 3 week follow up task). This makes the action easy to identify when you are assigning actions to contacts.
5. Select the type of action (Appointment, Email, Task)
6. Select how many days the action should be delayed after assigning this task to a contact. If you are assigning an email to go out, do you want the email to go out the day you assigned the action to a contact or do you want it to go out 7 days after you assigned the action to the contact.
7. Click **Save**.
8. This Sales Assistant Action will be available for you to assign to contacts.

Assigning Sales Assistant Actions to contacts

To set up contacts with Sales Assistant Actions, follow these steps:

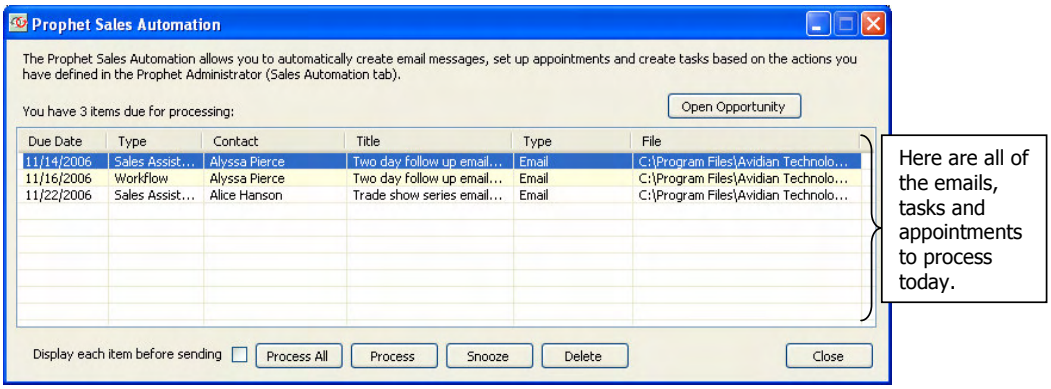
1. In Contact Manager, highlight a contact you would like to assign to an action.
2. Click on the Sales Automation tab in the Data Window.
3. Listed in this window you will see all of the actions you set up in the Prophet Actions tab in the Prophet Administrator.
4.



5. Check all of the actions you would like to apply to the contact(s) you have highlighted.
6. Select the start date for the actions. For each action you set up you defined a delayed time. The action will take place after the start date you select here. (ie, if the delay time for an action is 5 days, the action will take place 5 days from the start date you select here.)
7. Click **Apply**.
8. The Action(s) you checked and applied are now assigned to the contact and you will be prompted to process the actions on the day they are due in the 'Prophet Sales Automation' window.

What happens on the day the actions are due?

Every day when you open up Outlook, the Prophet Sales Assistant Window will open. This window will allow you to process, snooze, or edit actions.



To start processing the actions that are due today, follow these steps:

1. You have several options before processing the action that are due to process today.
    a. Click **Process All** and all emails will be sent out and all tasks and appointments will be created.
    b. Highlight an individual action and click **Process**. The email will be sent out or appointment or task created for the specific action you selected.
    c. Highlight an individual action or highlight several actions and click the **Snooze** button. This action will snooze for a 24 hour period. The next time you open up Outlook after the 24 hour snooze period, the Prophet Sales Assistant will be populated with the actions you snoozed.
    d. Click the **Close** button and all the item will sit in the Prophet Sales Assistant until you process them. You can open up the Prophet Sales Automation window when it is convenient for you by selecting Prophet Sales Automation from the tools drop down menu in Prophet.
    e. Checking the '**Display each item before sending**' box will allow you to edit the email before it is sent out, edit the task before it is saved and the appointment before it is saved.
        i. For tasks set up, you can highlight the task that appears in the Prophet Sales Assistant window and display it before it is saved. This is when you would select the due date for the task and then click Save and Close. This task will be associated with the contact it was created for and will show up in your Task Pad in Outlook and in Prophet today on the day that the task is due.
        ii. For appointments set up, you can highlight the appointment that appears in the Prophet Sales Assistant window and display it before it is saved. This is when you would select when you want the appointment to be set or invite any attendees. This Appointment will be associated with the contact you set this action up for and it will appear in your Outlook Calendar and in Prophet Today on the day that is due.
        iii. Displaying an email before you send it out allows you to edit and review the emails individually before they are sent out.

iv. If you check '**Display each item before sending'** and click **Process All**, all items due for processing will open up and allow you to edit before saving or sending.

Workflow

What is the Workflow Engine?

The Workflow Engine allows Prophet Users to set specific actions to occur as they are moving their opportunities through their sales process. For example, as you move an opportunity from one stage in your sales cycle to another, you can set the workflow engine to prompt a template email to be sent to the contact.

Steps to set up the Workflow Engine

Setting up new templates

The first thing you will need to do is to start creating template emails, tasks and appointments that will be sent out or created as you move your opportunity through your sales process.

1. Make sure you are using the Microsoft Office Word 2003 as your editor
    a. In Outlook, from the **Tools** menu select options.
    b. Click on the **Mail Format Tab**.
    c. In the Message format section, make sure that the box is checked next to **Use Microsoft Office Word 2003 to edit e-mail messages**.
    d. Click Apply and **OK**.
2. In the Opportunity Manager or the Contact manager, click on the **Tools** button.
3. Click on the **Sales Automation** tab.
4. At the top of the **Sales Automation** tab in the Template section, click on the **New** button.
5. Select from the Type drop down if this template is an appointment, email or task.
6. Fill in the Template Name.
7. Click **OK.**
8. A new window will appear according to the type of template you selected.
    e. Email type- Compose your email, fill in the subject line and attach any documents.
    f. Task type- Fill in the task. You do not need to fill in the due date or the start date. You will assign the due date as you process the task.
    g. Appointment type- Fill out the appointment. You do not need to fill in the due date. You will assign the appointment date when you set up the meeting.
9. Click the **Save Template** button in the email, appointment or task that you are creating.
10. The template that you saved will appear in your template listing in the **Sales Automation** tab in the Prophet Administrator.
11. Continue to create templates that you would like to set up as Workflow.

Setting up Workflow Actions

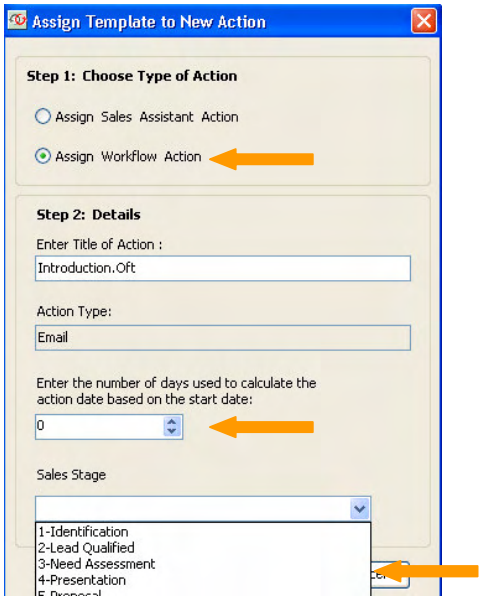
A Workflow Action could be one of the following

- An email action- An example is an email that you would send out when moving your opportunity through the different stages in your sales cycle. You can set a delay period to the email if you would like.
- A task action- An example is a task that will remind you to call a contact 6 days after you move an opportunity to a specific stage in the sales cycle.

- An appointment action- An example is an appointment that you will create when you move an opportunity to a specific stage in the sales cycle.

You can start setting up Workflow Actions with the templates that you created.

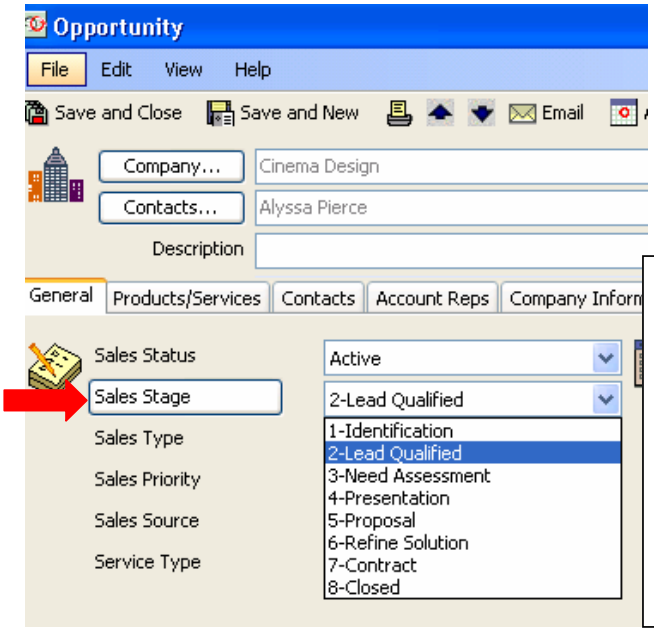
1. Click on the **Sales Automation** Tab in the Prophet Administrator.
2. Highlight the Template that you would like to set up as a workflow action and click **Assign**.
3. In the '**Assign Template to New Action**' window that displays, under Step 1 select **Assign Workflow Action**.



4. You can change the title of the action if you would like.
5. Select the delay period you want to apply to the action. If you select 0, then the template will display right away for you to process. If you assign a delay period, you will be prompted to process the template in the 'Sales Automation' window on the day it is due.
6. Select the stage you would like to apply this action to. The drop down list will show you all of the stages you have defined in your sales cycle.
7. Click **Save**.
8. This workflow action will appear in your listing. Next time you move an opportunity to the sales stage you assigned that action to you will be prompted to send out the email, set the task, or create an appointment.

Applying Workflow to your opportunities

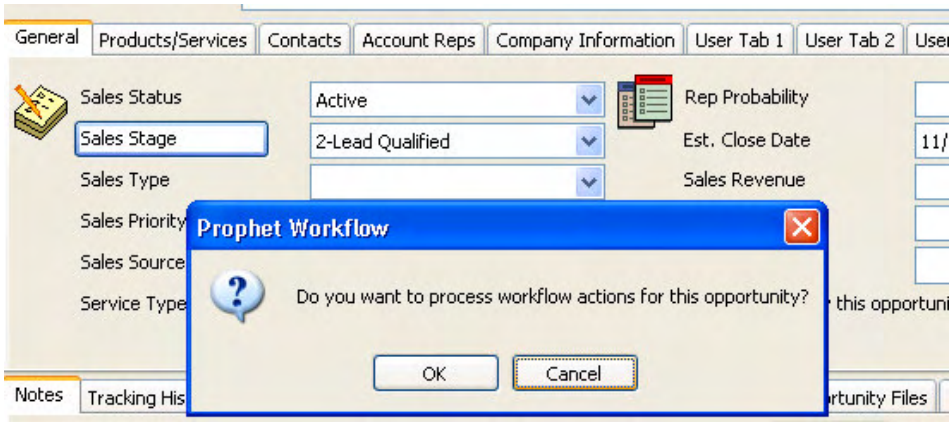
When you move an opportunity to a sales stage that there is a workflow action assigned to, click on the **Sales Stage** button. You will be prompted to process the workflow action.



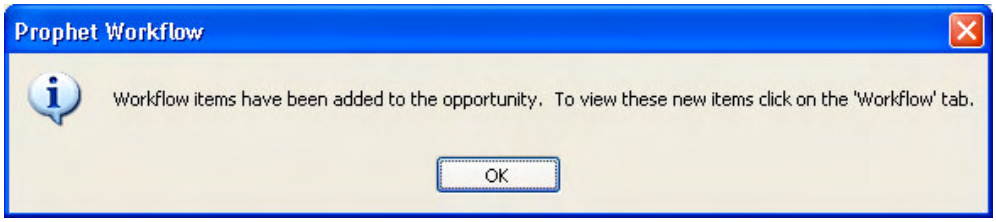
After you move an opportunity to different stage, click on the Sales Stage button. If there is a workflow associated with that stage you will be prompted to process it.

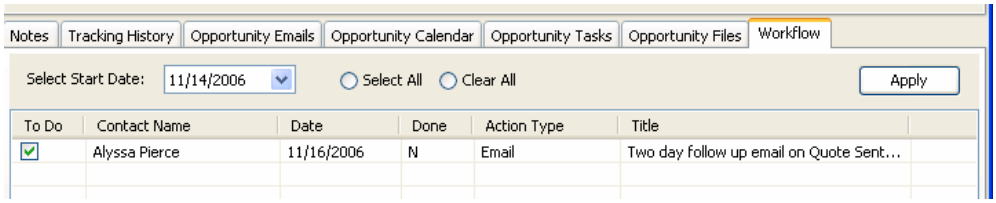
If there is a delay associated with that action, you will be prompted in the Sales Automation window on the day it is due to process.

1. If the action is an email:
    a. Select the Sales Stage and click the "Sales Stage" button.
        i. If the Workflow action does not have a delay period assigned to it, you will see a screen that will ask you if you want to process the workflow
            1. Click yes to process the action and the template email will display. You may edit the email before sending or you can click send.
            2. The email that you sent will be in your sent items in Outlook and also in the Opportunities Emails tab in the opportunity.
            3. A note will populate the notes field in the opportunity. Select a tracking type and click Add Note and Track. You will have a note in your history that this email was sent via workflow.



ii. If the Workflow action has a delay period assigned to it, the item will sit in the "Workflow" tab in the Opportunity window. On the day there are due to process, you will see them listed in the "Sales Automation" Window.
    1. Once you move the Opportunity to a new Sales Stage and click the "Sales Stage" button, Click OK to process, then the Workflow item will be saved to the opportunity.
    2. To see the Workflow items on set for the Opportunity, click on the "Workflow" tab in the Opportunity window. You will see the date the item is due to process.

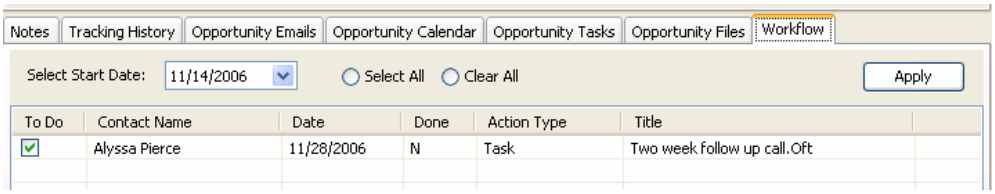




    3. To remove a Workflow that is set to process in the future, uncheck the box in the "To Do" column and click the "Apply" button.
    4. On the day the email is set to process, when you open Outlook, you will see the "Sales Automation window appear. You can close the window and open it again later if you want. To open later, click on the arrow next to the "Tools" button in the Contact Manager or Opportunity Manager and select "Prophet Sales Automation".

2. If the action is a task:
    a. If the Task does not have a delay associated with it:
        i. Click yes to process the action and the task template will display. You may assign a due date for the task and fill in any details and save the task.
        ii. The task will be saved to your Outlook Task Pad and it will appear on Prophet Today on the day it is due.
        iii. A note will populate the notes field in the opportunity. Select a tracking type and click Add Note and Track. You will have a note in your history that this task was created via Workflow.
    b. If the Task has a delay associated with it:
        i. Once you click the "Sales Stage" button, you will be asked if you want to process the workflow item for the opportunity.
        ii. Click "OK" to process and the Workflow item will be saved to the opportunity.

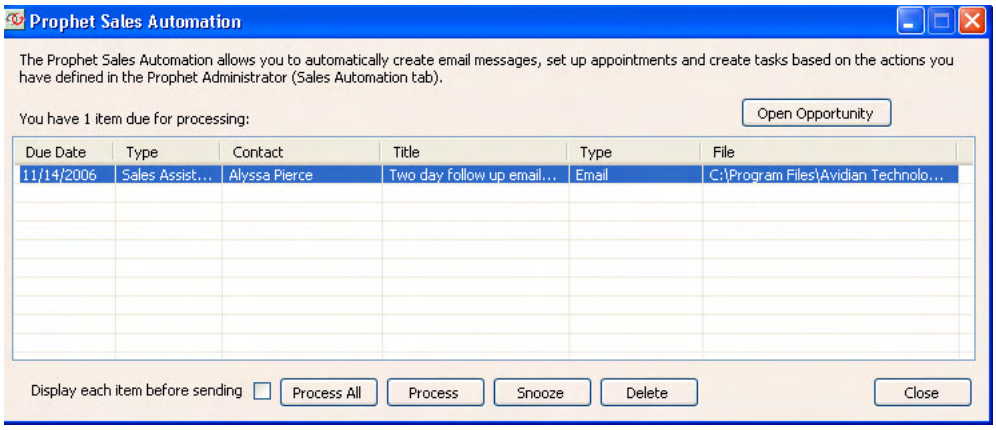
iii. To see the Workflow items on set for the Opportunity, click on the "Workflow" tab in the Opportunity window. You will see the date the item is due to process.



iv. To remove a Workflow that is set to process in the future, uncheck the box in the "To Do" column and click the "Apply" button.
v. On the day the task is set to process, when you open Outlook, you will see the "Sales Automation" window appear. You can close the window and open it again later if you want. To open later, click on the arrow next to the "Tools" button in the Contact Manager or Opportunity Manager and select "Prophet Sales Automation".

3. If the action is an appointment:
   a. If the Appointment Workflow does not have a delay associated with it:
      i. Click yes to process the action and the appointment template will display. You may select the day and time for the appointment, send it out as a meeting request or attach any files. Click Save and Close or Send if it is a meeting request.
      ii. A note will populate the notes field in the opportunity. You will have a note in your history that this appointment was created via Workflow.
   b. If the Appointment Workflow does have a delay associated with it:
      i. Once you click the "Sales Stage" button, you will be asked if you want to process the workflow item for the opportunity.
      ii. Click "OK" to process and the Workflow item will be saved to the opportunity.
      iii. To see the Workflow items on set for the Opportunity, click on the "Workflow" tab in the Opportunity window. You will see the date the item is due to process.
      iv. To remove a Workflow that is set to process in the future, uncheck the box in the "To Do" column and click the "Apply" button.
      v. On the day the appointment is set to process, when you open Outlook, you will see the "Sales Automation" window appear. You can close the window and open it again later if you want. To open later, click on the arrow next to the "Tools" button in the Contact Manager or Opportunity Manager and select "Prophet Sales Automation".

To start processing the actions in the Sales Automation Window:



2. You have several options for processing the action that are due today.
    a. Click "Process All" and all emails will be sent out and all tasks and appointments will be created.
    b. Highlight an individual action and click "Process". The email will be sent out or appointment or task created for the specific action you selected.
    c. Highlight an individual action or highlight several actions and click the Snooze button. This action will snooze for a 24 hour period. The next time you open up Outlook after the 24 hour snooze period, the Prophet Sales Automation will be populated with the actions you snoozed.
    d. Click the close button and all the item will sit in the Prophet Sales Automation until you process them. You can open up the Prophet Sales Automation window when it is convenient for you by selecting Prophet Sales Automation from the tools drop down menu in Prophet.
    e. Checking the Display each item before sending box will allow you to edit the email before it is sent out, edit the task before it is saved and the appointment before it is saved.
        i. For tasks set up, you can highlight the task that appears in the Prophet Sales Automation window and display it before it is saved. This is when you would select the due date for the task and then click "Save and Close". This task will be associated with the contact it was created for and will show up in your Task Pad in Outlook and in Prophet today on the day that the task is due.
        ii. For appointments set up, you can highlight the appointment that appears in the Prophet Sales Automation window and display it before it is saved. This is when you would select when you want the appointment to be set or invite any attendees. This Appointment will be associated with the contact you set this action up for and it will appear in your Outlook Calendar and in Prophet Today on the day that is due.
        iii. Displaying an email before you send it out allows you to edit and review the emails individually before they are sent out.
        iv. If you check Display each item before sending and click "Process All", all items due for processing will open up and allow you to edit before saving or sending.

Editing Workflows

If you decide that the template associated with a workflow needs to be edited, you can make that change in the Sales Automation Tab in the Prophet Administrator...

1. Click on the Tools button.
2. Click on the Sales Automation Tab.
3. In the templates section, highlight the template you wish to change.
4. Click on the "Edit" button.
5. Make necessary changes to the email, task or appointment template.
6. Click "Save Template".

The template is now changed and the next time you process this action in an opportunity, you will be prompted to send the updated template.

Sharing templates for use in Prophet Actions

To share a template with other users:

1. Open up a new email.
2. Insert file and browse for C:\Program Files\Avidian Technologies\Prophet\Templates.
3. Select the template(s) you would like to share.
4. Click OK.
5. Send the email the recipient.

When you receive an email with templates, you can save them to your c drive and have then available for use in the Sales Assistant and Workflow Engine.

To receive a template:

1. Right click on the attached file in the email.
2. Select Save.
3. Browse for C:\Program Files\Avidian Technologies\Prophet\Templates.
4. Click OK.

The template is now available for you to use and edit.

1. Click on Contact Manager.
2. Click on the Tools button.
3. Select the Sales Automation Tab.
4. You will now see the templates you saved listed under the template section of the Prophet Actions tab.
5. To edit a template, highlight the template and click Edit.

Part IV- OPPORTUNITY WINDOW

WHAT IS AN OPPORTUNITY?

An Opportunity is a progressive relationship between a buyer and a seller. An Opportunity is that relationship with a customer that leads to a sale, a completed project, or a transaction. It is the series of interactions that you wish to record.

You should create an opportunity for all of your leads. Every time you work with this contact, you will want to access the opportunity. In this record, you are going to track your notes, you will see a log of your email activity, your appointments and tasks will be tracked as well. You will also be able to start tracking data in this window such as where they are at in the sales cycle, revenue for this opportunity, estimated closed date and other information that you can customize.

CREATING A NEW OPPORTUNITY

There are several ways to create opportunities.

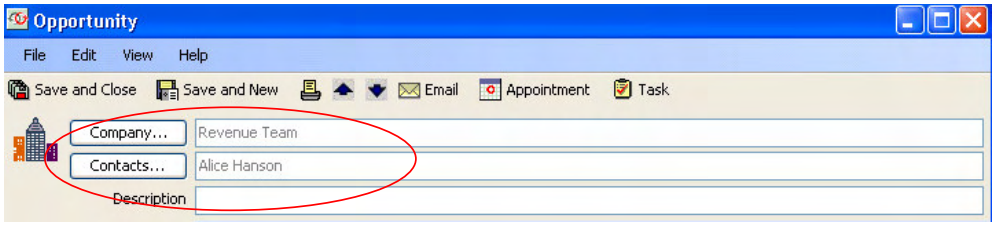
1. From Contact Manager
2. Using the New Button
3. From an email

Create an opportunity in Contact Manager by Contact

You can create an opportunity in the Contact Manager by right clicking a contact or company name and selecting "New Opportunity" from the menu.

1. Go to Contact Manager
2. Highlight to the contact or company you wish to create a new opportunity for.
3. Right click on the contact/company
4. From the list, select "New Opportunity with Contact/Company"

5. A new opportunity screen will come up, but when done this way the name and company are populated into the name and company fields.



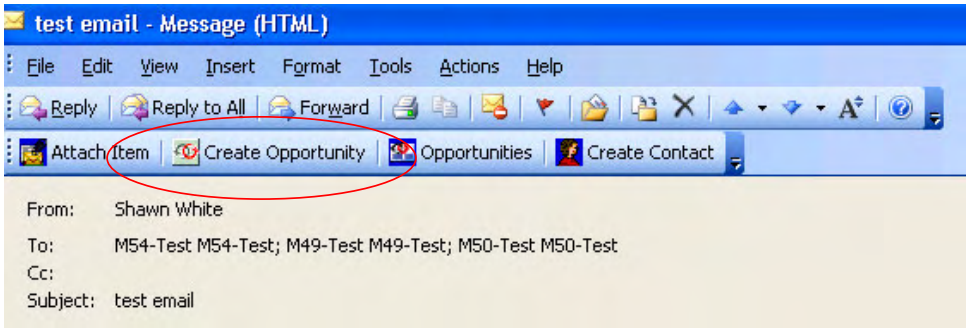
Create an opportunity using the New button in the Prophet toolbar

Clicking on the New button pulls up a blank Opportunity Window. You will need to attach contacts and company records to the blank Opportunity.

1. Click on the New Button in the Prophet Toolbar.
2. A blank Opportunity Window appears.
3. Click on the Company button at the top of the Opportunity.
4. Highlight the company name you wish to associate to the Opportunity and click OK.
5. Click on the Contacts button and select the contact from your contact list you wish to associate to the Opportunity. Click OK.
6. You can continue to fill out the Opportunity Window with more details.

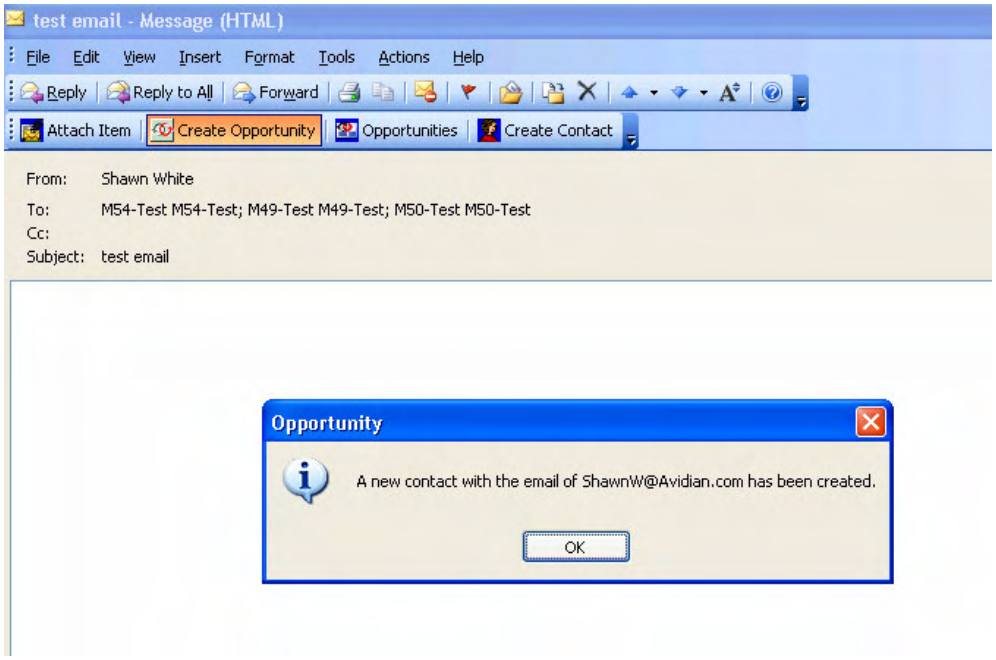
Create an opportunity from an email

With Prophet 4.0 installed, you will have the option of viewing the Prophet toolbar in your email messages. In an email, you will see the Attach Email button and the Create Opportunity button.



You can create an opportunity directly from the email.

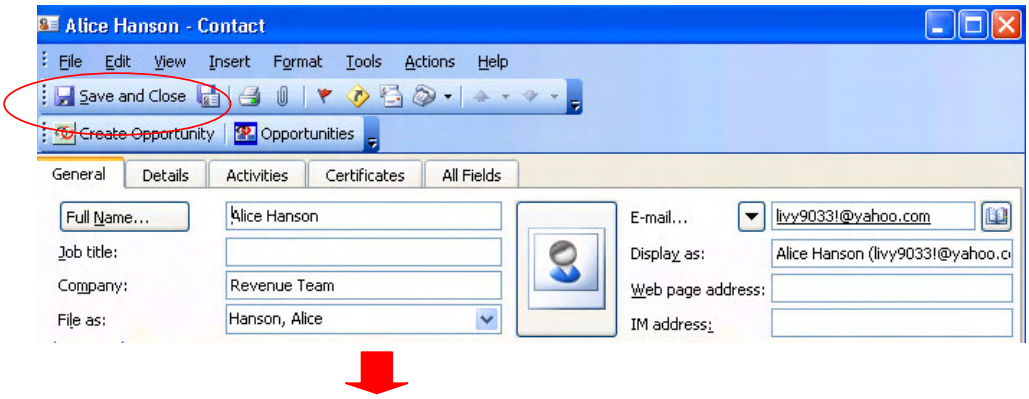
1. In your Outlook Inbox, open an email.
2. Click on the Create Opportunity button in the email.
3. If the contact that emailed you doesn't exist as a contact in your records, a contact is created.

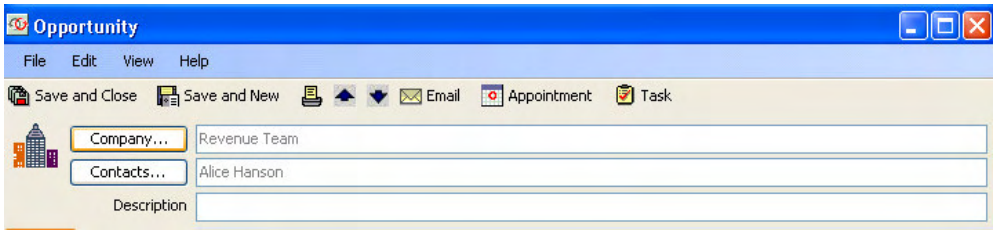

test email - Message (HTML)
File Edit View Insert Format Tools Actions Help
Reply Reply to All Forward
Attach Item Create Opportunity Opportunities Create Contact
From: Shawn White
To: M54-Test M54-Test; M49-Test M49-Test; M50-Test M50-Test
Cc:
Subject: test email
Opportunity
A new contact with the email of ShawnW@Avidian.com has been created.
OK

4. If a contact already exists, a new opportunity will be created for the contact.
5. The opportunity window will display and the contact will be associated with the opportunity and the body of the email saved in the notes tab of the opportunity.

Create an opportunity from a contact

1. Open an Outlook Contact
2. Click on the Create Opportunity Button
3. A new Opportunity is created with the Contact and Company name associated with the opportunity.

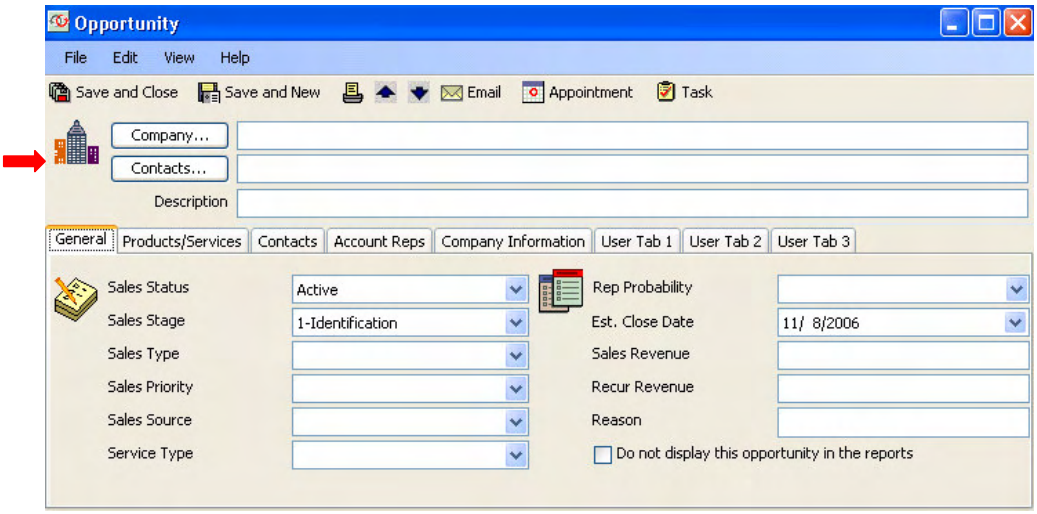




FILLING OUT THE OPPORTUNITY WINDOW

You opened up a new opportunity window and filled in the contact and company information. You can continue to fill out the rest of the opportunity.

In the middle of the opportunity window, you will see a row of tabs.



General Tab:
There are two columns with labels and drop down values associated with the label. All of these labels in the general tab are customizable as well as the drop down values. *(To read about customizing the labels and values, please go to the Prophet Administrator section of the User Guide.)*

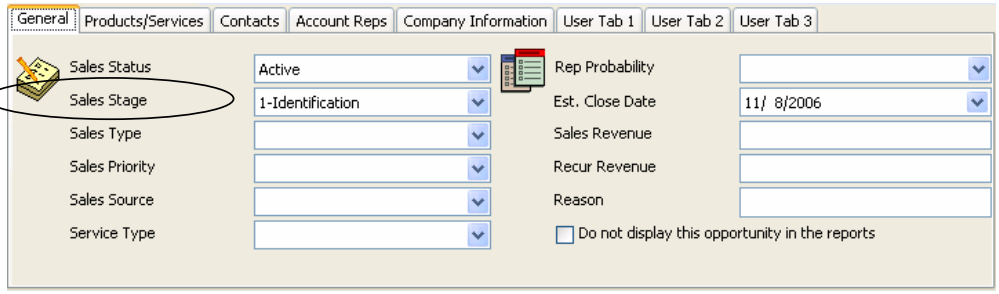
To select from the drop down list, click on the arrow to the right of the field and select the value in the drop down list.

NOTE The Estimated Close Date field must be a calendar value.
The Sales Revenue and Recur Revenue fields must contain numeric values.

The Reason field must contain text.

NOTE There are reports associated with values in the drop down for Sales Status. See the Prophet Administrator section of the User Guide for more details on customizing these values.

NOTE For users with Prophet Enterprise, the Sales Stage label will be a button for use in the Workflow Engine. Please view the Workflow portion of the user guide for details.

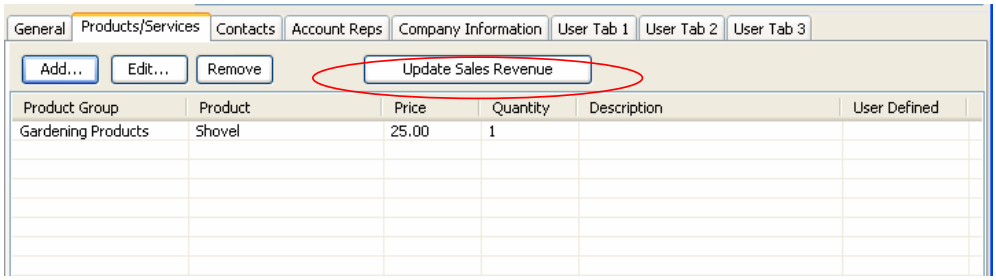


Products/Services Tab

You can start tracking what Product or Service the Opportunity was created for. *(Go to the Prophet Administrator section of the User Guide to read about customizing Products and Services*).

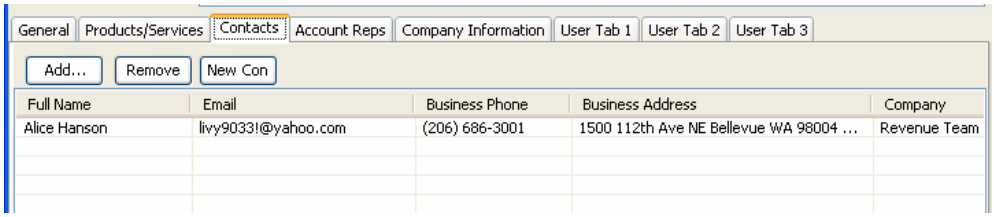
To add a Product or Service to an opportunity:

1. Open up an opportunity
2. Click on the Products/ Services tab
3. Click Add
4. Select the product/service group from the Select a Group dropdown.
5. Select Product or Service from the Select Product/Service dropdown.
6. Click Add
7. Click Close
8. If you want the price of the products you are adding to the Opportunity to populate the General Tab Revenue field, click on the Update Sales Revenue button.



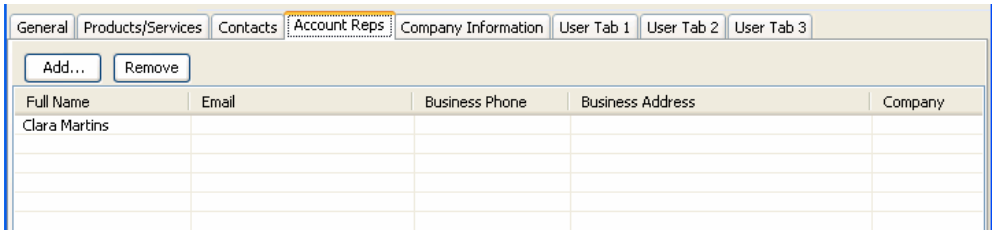
Contacts Tab
The contact tab displays the contact information for the contact(s) the opportunity is created for. You can double click on the contact listed and it will bring up the contact form for that person.

You can add, remove or create a new contact with the buttons in this tab.

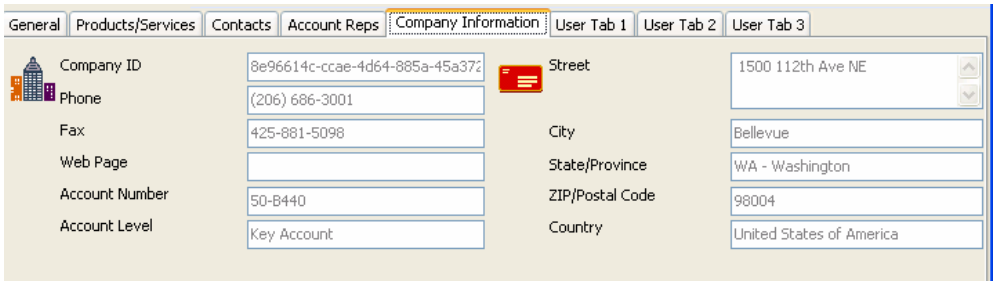


Account Rep Tab
The name of the person creating the opportunity will automatically be listed as the account rep. The name that is populating this field is the Username set up for the user. If you are creating an opportunity for someone else to work on, you can assign it to another person.

1 Highlight the name listed
2 Click Remove
3 Click Add
4 Pick from your folder list the contact you wish to assign the opportunity to.
5 You can double click on the contact listed and it will bring up the contact form for that person.

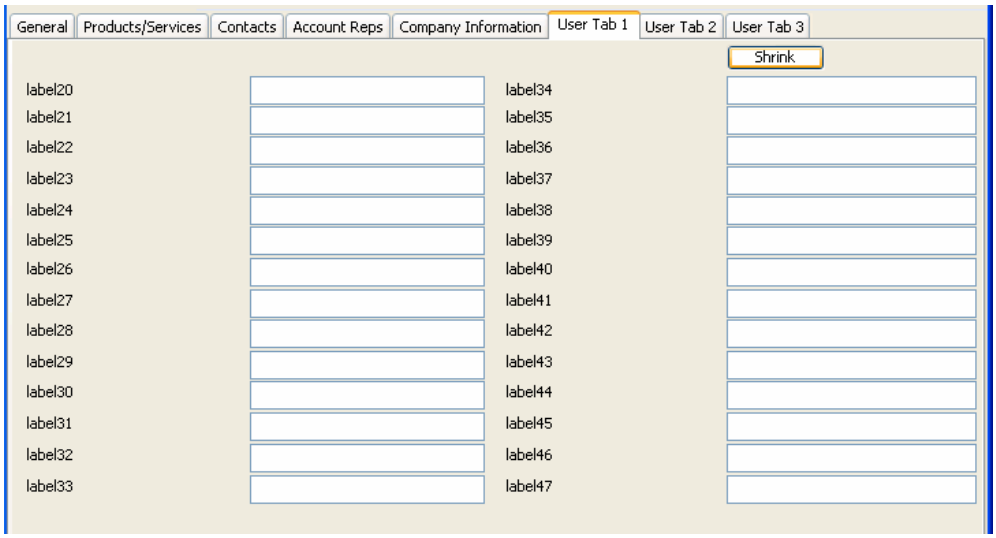


Company Information
You can view company phone, fax, website, address by clicking on the company tab. To edit the company information, you will need to open up the Company Record in Contact Manager.

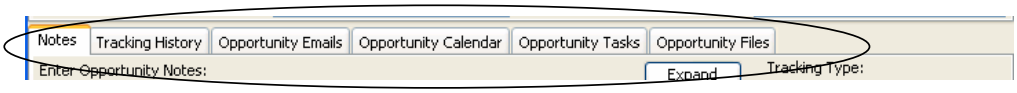


User Tabs

The user tabs allow you to track additional information for your opportunity. There are 84 different labels and fields that you can customize. These fields can be text fields or drop down fields. The data you collect on these three tabs you can pull into reports and you can also sort by them in the Opportunity Manager. *(To read instructions on how to customize the user tabs and fields, view the section on Prophet Administrator in the User Guide.)*



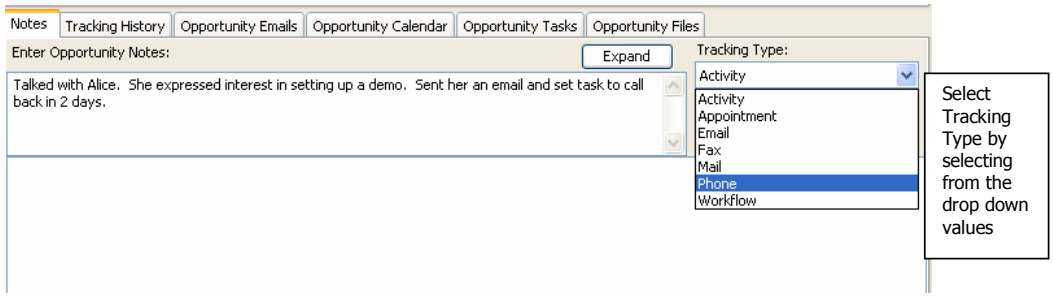
At the bottom of an opportunity window you will see another row of tabs.



Notes Tab

This is the tab in which you will enter your notes for the opportunity.

1. Open the opportunity
2. Place cursor in the Enter Opportunity Notes field by clicking in the field.
3. Type the notes you wish to track
4. Select Tracking type by clicking on the drop down arrow under tracking type



5. Click "Add Note and Track".
6. The note you typed will be moved down to the note history screen below. The note will be time and date stamped and tracked by the specific tracking type you selected.
7. Once a note has been tracked it cannot be edited or deleted.

NOTE You can customize the Tracking Type drop down value in the Prophet Administrator. See the Prophet Administrator section of the User Guide.

Tracking History Tab

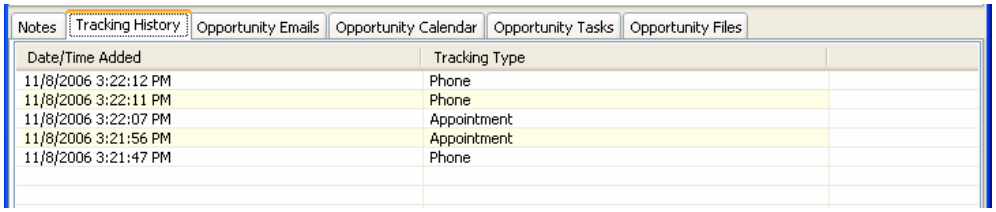
By clicking on the tracking history tab you can see a list view of the type of activity you had related to the opportunity. This information is pulled directly from the tracking type you are. You can easily review the dates and times the notes were entered and the type of note.

You can view how many phone conversations, emails, appointments and mail activity you had with the client.

The tracking history has two columns

1. Date/Time Added
2. Tracking Type

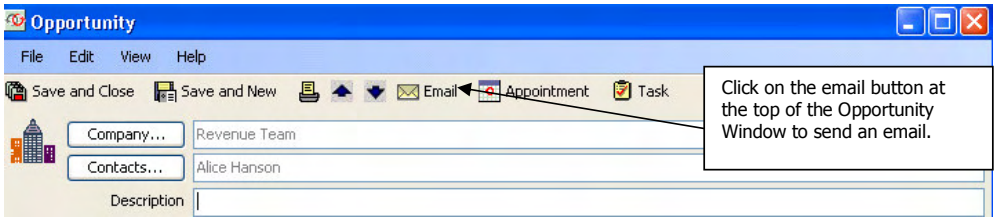
You can sort by these two columns by clicking on the column header.



Opportunity Emails Tab

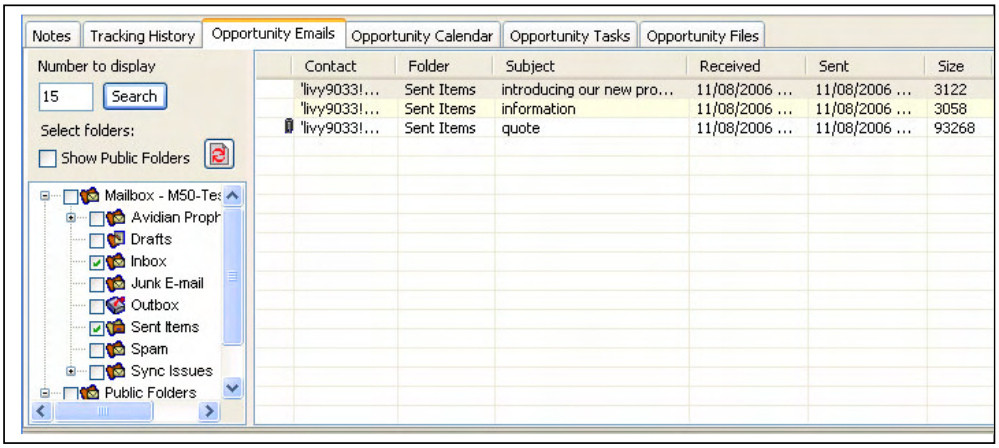
Managing emails associated with opportunities

All emails that you send out from the Opportunity Window using the email button will be linked to the opportunity and will be displayed in the Opportunity Emails tab.

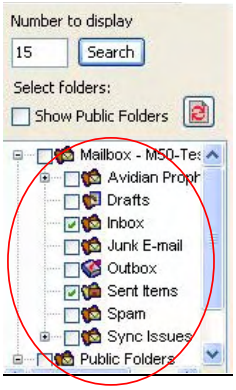


Sending an email out from the Opportunity Window:

1. Click on the email button in the Opportunity Window.
2. An email form will pop up with the email address auto populated.
3. Fill out the email, attach any files
4. Click Send.
5. The email will be in your sent items in Outlook and you will be able to view that email in the opportunity window by clicking on the Opportunity Emails tab and clicking the "Search" button.



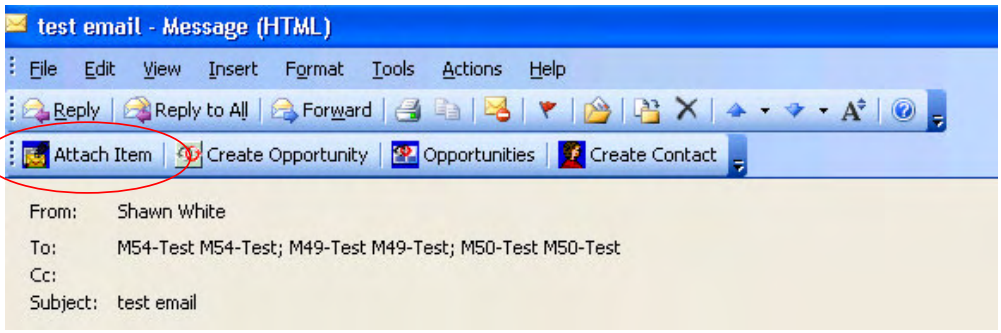
NOTE
To make sure the email displays in the Opportunity Email tab, make sure you are pointed to your Inbox and Sent Items and any other folder you are storing your emails in. In the folder list, check the folders you want to search in.



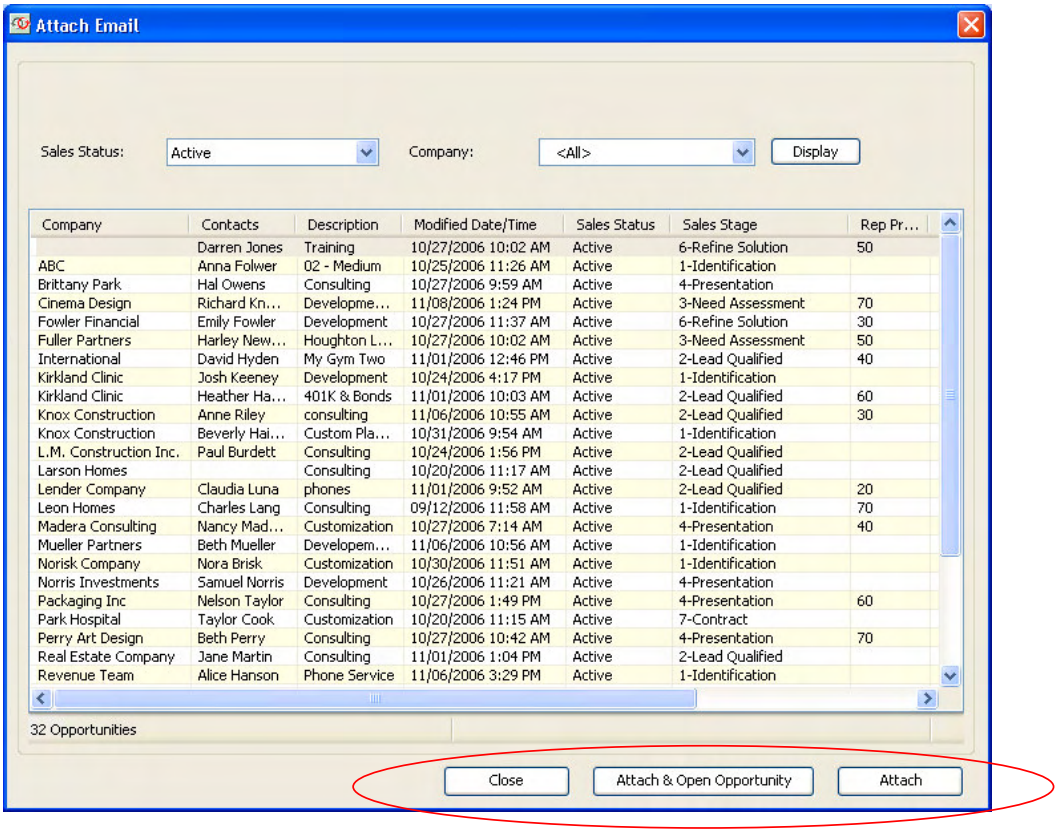
Attaching an incoming email to an opportunity

To attach an email to an opportunity:

1. Open email.
2. Click on the Attach Email button.


test email - Message (HTML)
File Edit View Insert Format Tools Actions Help
Reply Reply to All Forward
Attach Item Create Opportunity Opportunities Create Contact
From: Shawn White
To: M54-Test M54-Test; M49-Test M49-Test; M50-Test M50-Test
Cc:
Subject: test email

3. A list of your opportunities will display. Highlight the opportunity you wish to attach the email to.
4. To attach the email click the Attach button in the lower right corner.
5. To attach the email and open the opportunity, click the Attach and Open Opportunity button in the lower right corner.
6. The email will be linked to the opportunity in the Opportunity Emails tab.
7. For users of the Prophet Server Edition with Exchange, a copy of that email will be saved in the public folder called Opportunity Emails.

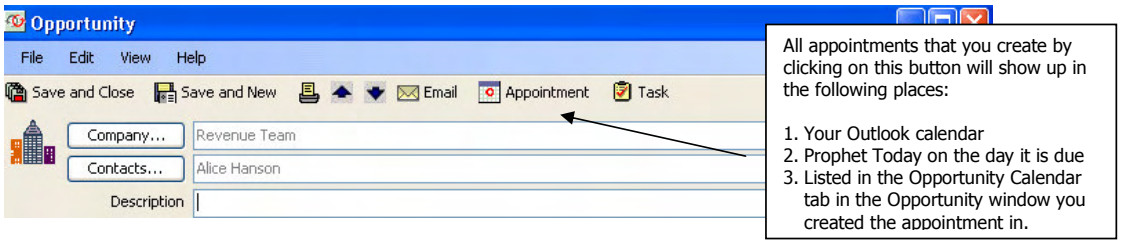

Attach Email
Sales Status: Active
Company: <All>
Display
Company Contacts Description Modified Date/Time Sales Status Sales Stage Rep Pr...
Darren Jones Training 10/27/2006 10:02 AM Active 6-Refine Solution 50
ABC Anna Folwer 02 - Medium 10/25/2006 11:26 AM Active 1-Identification
Brittany Park Hal Owens Consulting 10/27/2006 9:59 AM Active 4-Presentation
Cinema Design Richard Kn... Developme... 11/08/2006 1:24 PM Active 3-Need Assessment 70
Fowler Financial Emily Fowler Development 10/27/2006 11:37 AM Active 6-Refine Solution 30
Fuller Partners Harley New... Houghton L... 10/27/2006 10:02 AM Active 3-Need Assessment 50
International David Hyden My Gym Two 11/01/2006 12:46 PM Active 2-Lead Qualified 40
Kirkland Clinic Josh Keeney Development 10/24/2006 4:17 PM Active 1-Identification
Kirkland Clinic Heather Ha... 401K & Bonds 11/01/2006 10:03 AM Active 2-Lead Qualified 60
Knox Construction Anne Riley consulting 11/06/2006 10:55 AM Active 2-Lead Qualified 30
Knox Construction Beverly Hai... Custom Pla... 10/31/2006 9:54 AM Active 1-Identification
L.M. Construction Inc. Paul Burdett Consulting 10/24/2006 1:56 PM Active 2-Lead Qualified
Larson Homes Consulting 10/20/2006 11:17 AM Active 2-Lead Qualified
Lender Company Claudia Luna phones 11/01/2006 9:52 AM Active 2-Lead Qualified 20
Leon Homes Charles Lang Consulting 09/12/2006 11:58 AM Active 1-Identification 70
Madera Consulting Nancy Mad... Customization 10/27/2006 7:14 AM Active 4-Presentation 40
Mueller Partners Beth Mueller Developem... 11/06/2006 10:56 AM Active 1-Identification
Norisk Company Nora Brisk Customization 10/30/2006 11:51 AM Active 1-Identification
Norris Investments Samuel Norris Development 10/26/2006 11:21 AM Active 4-Presentation
Packaging Inc Nelson Taylor Consulting 10/27/2006 1:49 PM Active 4-Presentation 60
Park Hospital Taylor Cook Customization 10/20/2006 11:15 AM Active 7-Contract
Perry Art Design Beth Perry Consulting 10/27/2006 10:42 AM Active 4-Presentation 70
Real Estate Company Jane Martin Consulting 11/01/2006 1:04 PM Active 2-Lead Qualified
Revenue Team Alice Hanson Phone Service 11/06/2006 3:29 PM Active 1-Identification
32 Opportunities
Close
Attach & Open Opportunity
Attach

Opportunity Calendar Tab
Managing appointments associated with opportunities

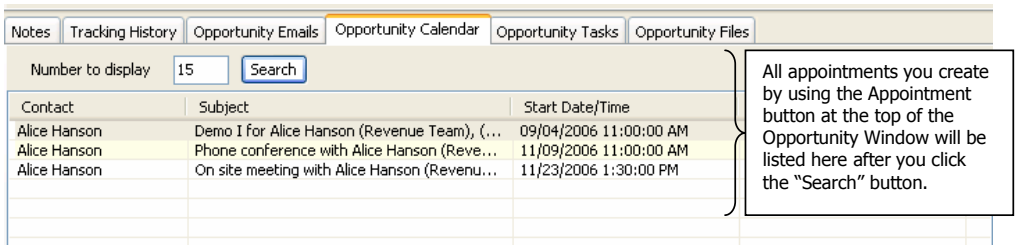
All appointments you create in the Opportunity Window will be listed out in the Opportunity Calendar Tab. You can also associate appointments created outside of an opportunity to the opportunity.

Creating an appointment in the Opportunity Window.

1. Open the Opportunity.
2. Click on the "Appointment" button at the top of the Opportunity.


Opportunity
File Edit View Help
Save and Close
Save and New
Email
Appointment
Task
Company...
Revenue Team
Contacts...
Alice Hanson
Description
All appointments that you create by clicking on this button will show up in the following places:
1. Your Outlook calendar
2. Prophet Today on the day it is due
3. Listed in the Opportunity Calendar tab in the Opportunity window you created the appointment in.

3. Fill out the Outlook Appointment item.
   a. Attach any files.
   b. Invite any attendees.
4. Click "Save and Close".
5. That Appointment you just created will show up in the following places
   a. Your Outlook calendar
   b. In Prophet Today on the day that it is due
   c. In the Opportunity Calendar Tab at the bottom of the Opportunity Window you created it in.



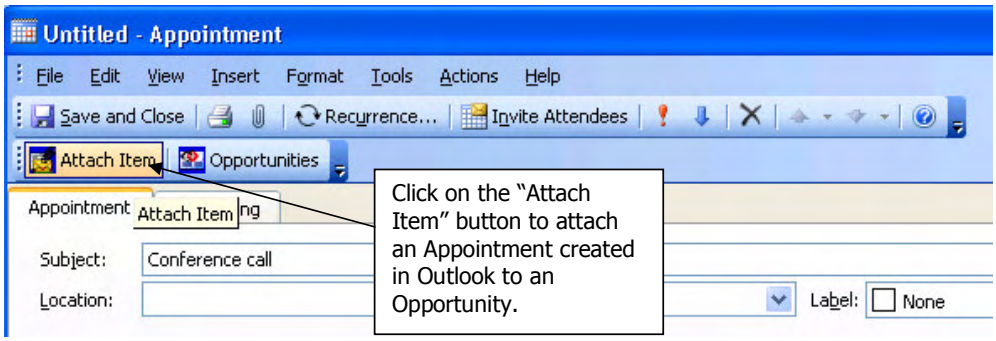
Attaching appointments on your Outlook Calendar to an Opportunity

If you create an Appointment directly on your Outlook Calendar or you accept a meeting request, you can associate that Appointment to any Opportunity you have saved.

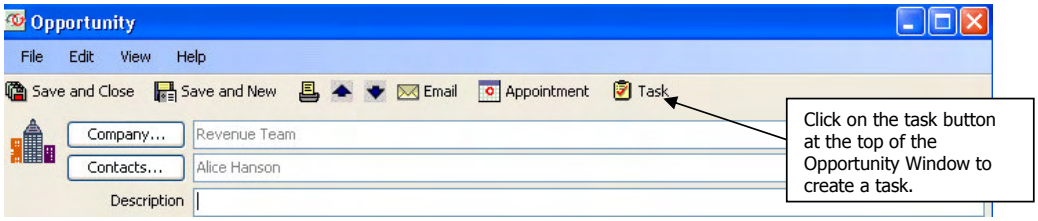
Steps to associate an Appointment that was created in your Outlook Calendar to an Opportunity.

1. Open the Appointment.
2. Click on the Attach Item button in the Appointment.
3. A list of your opportunities will appear in the "Attach Appointment" Window.
4. Highlight the Opportunity you wish to attach the Appointment to.

5. Click on the "Attach" button to attach the Appointment to the Opportunity.
6. Click on the "Attach & Open Opportunity" button to attach the Appointment and open up the Opportunity.
7. For users of the Prophet Server Edition with Exchange, a copy of that Appointment will be saved in the Public Folder called Opportunity Calendar.



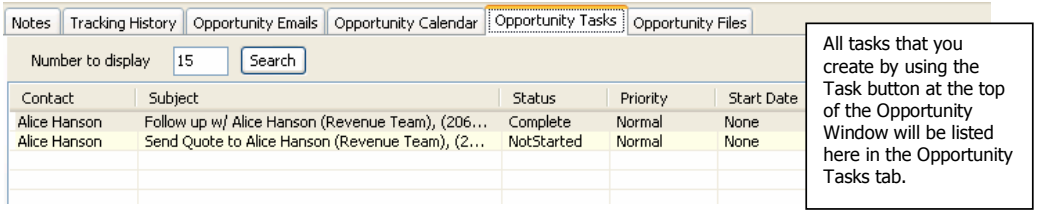
Opportunity Tasks Tab
Managing tasks associated with opportunities



All tasks you create in an Opportunity will be associated with the Opportunity and will display in your Outlook task folder and also in Prophet Today on the day they are due. You can also attach tasks that were created directly in Outlook to an Opportunity.

Creating a task in the Opportunity Window

1. Open up the Opportunity.
2. Click on the "Task" button at the top of the window.
3. Fill out the subject line and due date in the Task.
4. Save and close the Task.
5. The Task you just created will show up in the following places:
   a. Your Outlook Task Folder.
   b. In Prophet Today on the day that it is due.
   c. In the Opportunity Task tab at the bottom of the Opportunity Window the Task is associated with.



All tasks that you create by using the Task button at the top of the Opportunity Window will be listed here in the Opportunity Tasks tab.

NOTE If you delete a task from your task pad, the task will not be listed under the Opportunity Task tab.

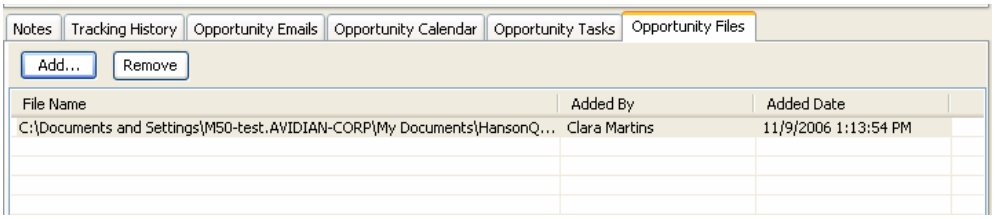
Attaching a task created outside of an opportunity to an opportunity

1. Open up a task that was created outside of an opportunity.
2. Click on the Attach opportunity button in the toolbar in the task.
3. A list of your opportunities will display.
4. Highlight the opportunity you wish to associate the task with.
5. Click on the Attach button to attach the task.
6. Click on the Attach & Open Opportunity button to attach the task and open the opportunity.
7. For users of the Prophet Server Edition with Exchange, a copy of that task will be saved in the Public Folder called Opportunity Tasks.

Opportunity Files Tab

If you have documents that you need to reference when working on an Opportunity, you can create a link to the document in the Opportunity Files tab.

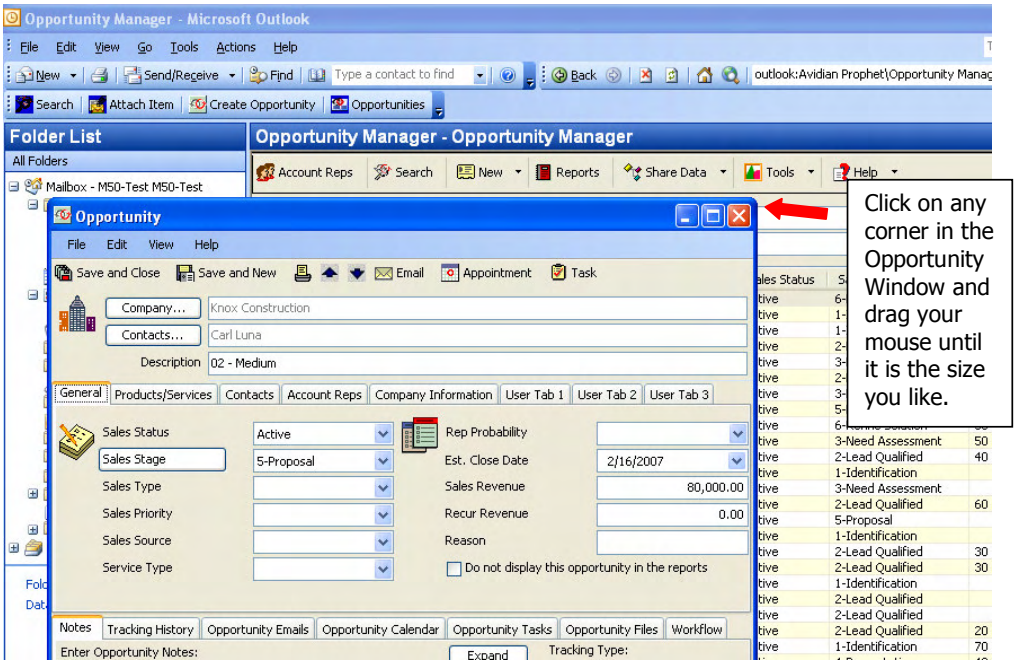
1. Open up the Opportunity.
2. Click on the Opportunity Files tab.
3. Click the Add button.
4. Browse for where you have the file saved.
5. Select the file and click "open".
6. The link to the file will be listed under the Opportunity Files tab.
7. To open the file, double click on the link and the document will open.



NOTE If you move where the file is saved, the link will be lost and you will have to create a new link to the opportunity.

Resizing the Opportunity Window

If you would like the Opportunity Window to be larger or smaller, you can do so by clicking on an outside corner of the Opportunity Window and dragging your cursor until the window is the size you like. Every time you open an Opportunity Window, it will appear the size you selected.

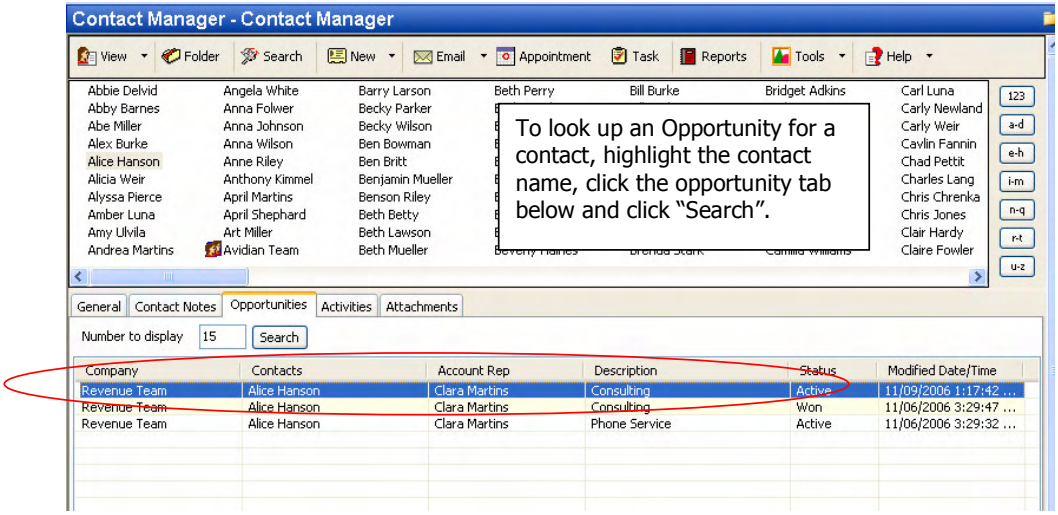

Opportunity Manager - Microsoft Outlook
Folder List
Opportunity Manager - Opportunity Manager
Opportunity
Click on any corner in the Opportunity Window and drag your mouse until it is the size you like.

LOOKING UP OPPORTUNITY RECORDS

Every time you are working with your prospects, you will want to look up their Opportunity Window so you can reference your notes, add new notes, and start tracking detailed information. You can look up opportunities that you have saved in a few different places. From the Contact Manager, Opportunity Manager or from any email, task or calendar item the opportunity is associated with.

<u>Retrieving saved Opportunities in the Contact Manager</u>

1. Click on Contact Manager.
2. Highlight the contact name or company name the opportunity is associated with.
3. Click on the Opportunities tab in the data window.
4. Click display.
5. Double click on the Opportunity you wish to display.

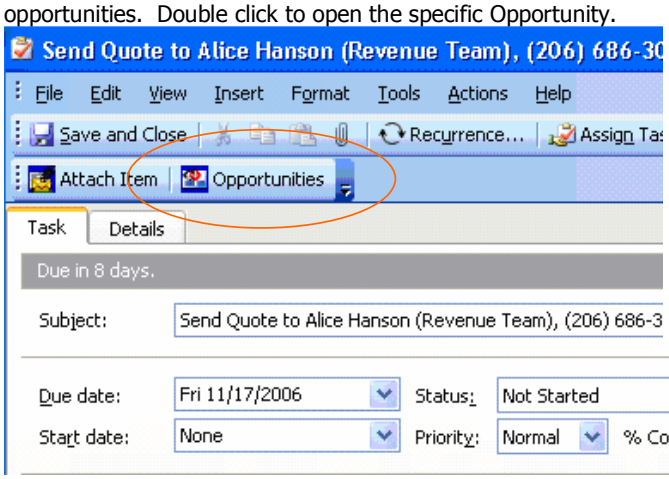


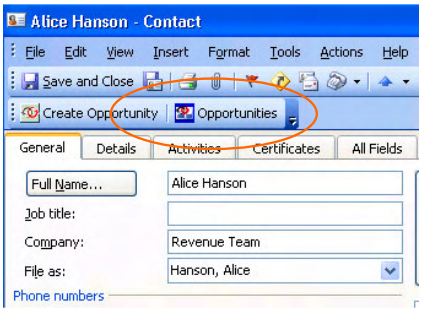
Retrieving saved Opportunities in the Opportunity Manager

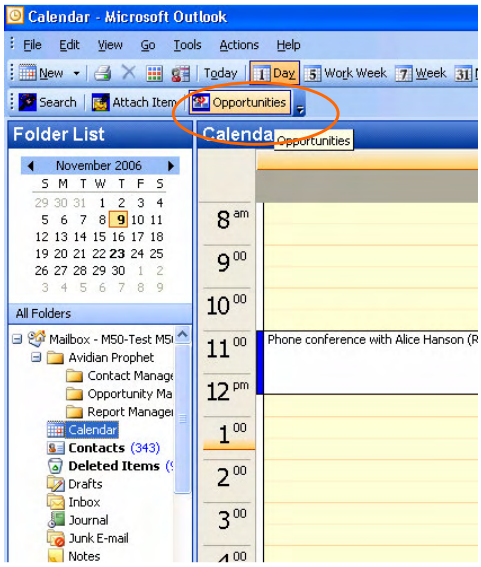
The Opportunity Manager lists out all the opportunities you have created. Double click on any opportunity you have listed there and the Opportunity window will be displayed. To read more about sorting and filtering your opportunities, go to the Opportunity Manager section of the User Guide.

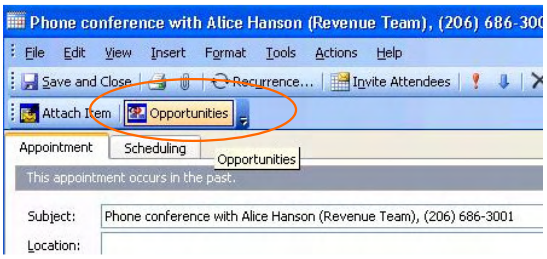
Retrieving saved Opportunities from any associated Outlook Contact, Task. Email or Calendar Item.

You can look up saved Opportunities directly from your Outlook Calendar, Task, Email or Contact item by clicking on the "Opportunities" button found in the Outlook Item. If only one Opportunity exists associated with the Outlook Item, the Opportunity will display. If more than one Opportunity exists associated with the Outlook Item, you will see a listing of the associated opportunities. Double click to open the specific Opportunity.





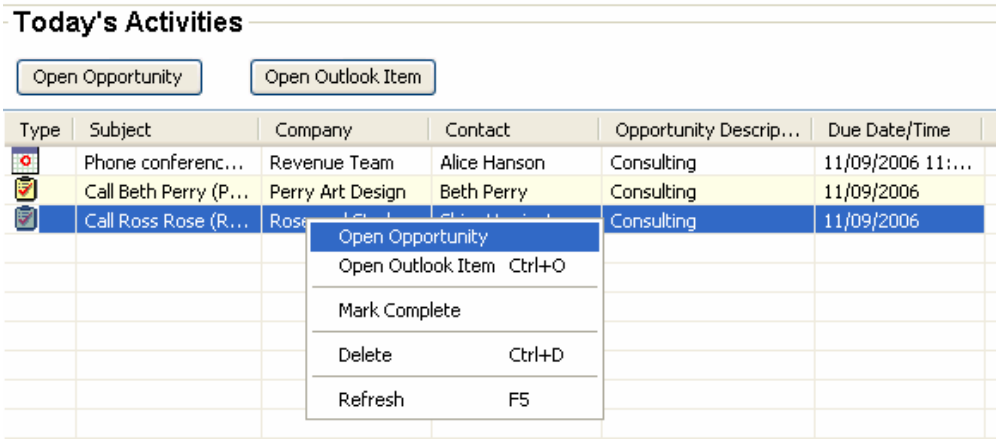




Retrieving saved opportunities in Prophet Today

Prophet Today will list all of the tasks and appointments that you have due today. If the task is linked to an opportunity, you will be able to move directly from the Task or Appointment listed directly into the Opportunity Window.

1. Click on the Avidian Prophet folder in your Outlook Folder List
2. At the bottom of the window you will see a list under "Today's Activities" of the tasks and appointments due today.
3. Right click on a task or appointment and select Open Opportunity or click the "Open Opportunity" button.
4. The Opportunity the task is associated with will be displayed.



PART V- OPPORTUNITY MANAGER

An Opportunity is a progressive relationship between a buyer and a seller. An Opportunity is that relationship with a customer that leads to a sale, a completed project, or a transaction. It is the series of interactions that you wish to record.

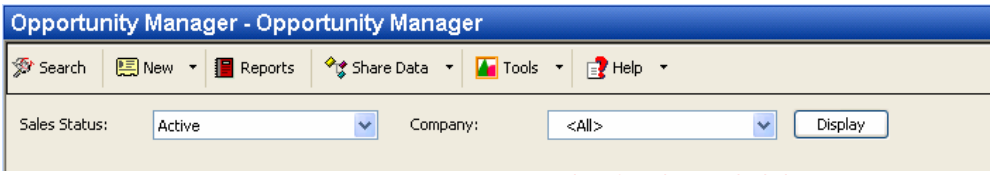
The Opportunity Manager lists out all the opportunities you have created.

VIEWING YOUR OPPORUTNITIES

1. Filtering your opportunities

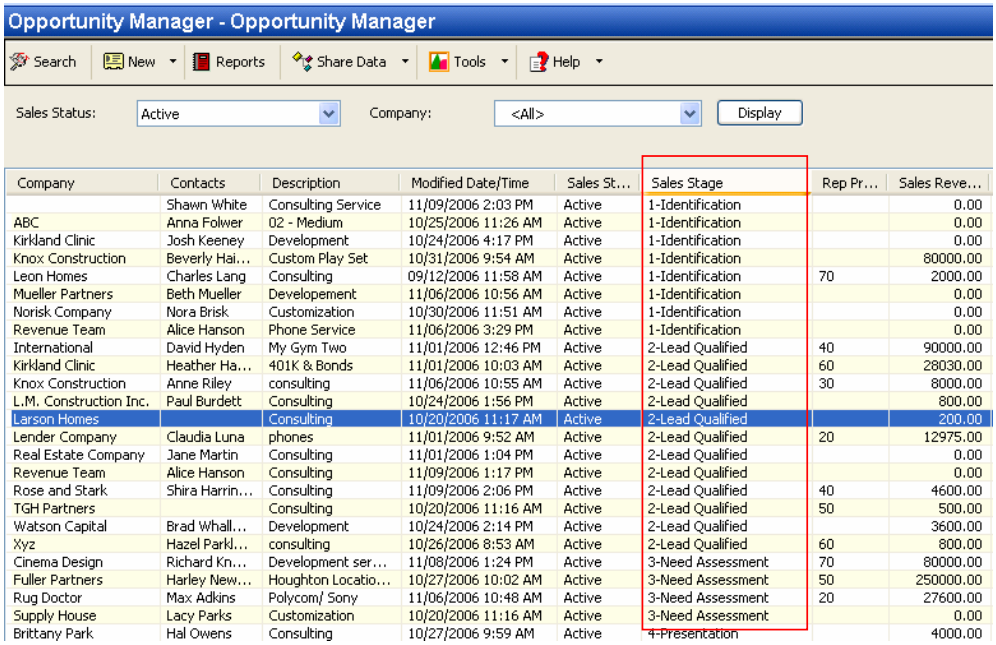
   You can filter your view of opportunities in the Opportunity Manager by using the drop down filters at the top of the window. You can filter by the following values:
   a. Sales Status (Available with all versions of Prophet)
   b. Company (Available with all versions of Prophet)
   c. Sales Stage (Available for Prophet Professional and Prophet Enterprise users)
   d. Sales Type (Available for Prophet Professional and Prophet Enterprise users)

   To filter, select from the drop down and click the "Display" button.



Screenshot of Prophet Standard Client Opportunity Manager

2. Sorting your opportunities
   You can sort your opportunities by clicking on the column headers in the Opportunity Manager.



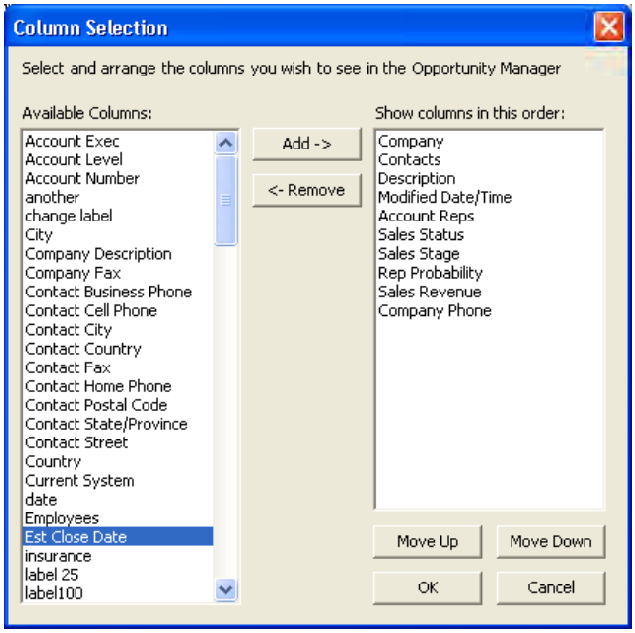
Company	Contacts	Description	Modified Date/Time	Sales St...	Sales Stage	Rep Pr...	Sales Reve...
	Shawn White	Consulting Service	11/09/2006 2:03 PM	Active	1-Identification		0.00
ABC	Anna Folwer	02 - Medium	10/25/2006 11:26 AM	Active	1-Identification		0.00
Kirkland Clinic	Josh Keeney	Development	10/24/2006 4:17 PM	Active	1-Identification		0.00
Knox Construction	Beverly Hai...	Custom Play Set	10/31/2006 9:54 AM	Active	1-Identification		80000.00
Leon Homes	Charles Lang	Consulting	09/12/2006 11:58 AM	Active	1-Identification	70	2000.00
Mueller Partners	Beth Mueller	Developement	11/06/2006 10:56 AM	Active	1-Identification		0.00
Norisk Company	Nora Brisk	Customization	10/30/2006 11:51 AM	Active	1-Identification		0.00
Revenue Team	Alice Hanson	Phone Service	11/06/2006 3:29 PM	Active	1-Identification		0.00
International	David Hyden	My Gym Two	11/01/2006 12:46 PM	Active	2-Lead Qualified	40	90000.00
Kirkland Clinic	Heather Ha...	401K & Bonds	11/01/2006 10:03 AM	Active	2-Lead Qualified	60	28030.00
Knox Construction	Anne Riley	consulting	11/06/2006 10:55 AM	Active	2-Lead Qualified	30	8000.00
L.M. Construction Inc.	Paul Burdett	Consulting	10/24/2006 1:56 PM	Active	2-Lead Qualified		800.00
Larson Homes		Consulting	10/20/2006 11:17 AM	Active	2-Lead Qualified		200.00
Lender Company	Claudia Luna	phones	11/01/2006 9:52 AM	Active	2-Lead Qualified	20	12975.00
Real Estate Company	Jane Martin	Consulting	11/01/2006 1:04 PM	Active	2-Lead Qualified		0.00
Revenue Team	Alice Hanson	Consulting	11/09/2006 1:17 PM	Active	2-Lead Qualified		0.00
Rose and Stark	Shira Harrin...	Consulting	11/09/2006 2:06 PM	Active	2-Lead Qualified	40	4600.00
TGH Partners		Consulting	10/20/2006 11:16 AM	Active	2-Lead Qualified	50	500.00
Watson Capital	Brad Whall...	Development	10/24/2006 2:14 PM	Active	2-Lead Qualified		3600.00
Xyz	Hazel Parkl...	consulting	10/26/2006 8:53 AM	Active	2-Lead Qualified	60	800.00
Cinema Design	Richard Kn...	Development ser...	11/08/2006 1:24 PM	Active	3-Need Assessment	70	80000.00
Fuller Partners	Harley New...	Houghton Locatio...	10/27/2006 10:02 AM	Active	3-Need Assessment	50	250000.00
Rug Doctor	Max Adkins	Polycom/ Sony	11/06/2006 10:48 AM	Active	3-Need Assessment	20	27600.00
Supply House	Lacy Parks	Customization	10/20/2006 11:16 AM	Active	3-Need Assessment		0.00
Brittany Park	Hal Owens	Consulting	10/27/2006 9:59 AM	Active	4-Presentation		4000.00

ADDING AND REMOVING COLUMNS IN THE OPPORTUNTIY MANAGER

You can choose which columns you are viewing in the Opportunity Manager.

1. Right click on an opportunity listed in the Opportunity Manager.
2. Select Choose Columns from the drop down list.
3. The Column Selection screen will display.
3. Under the Available Columns side of the screen you will see the fields you can add to the Opportunity Manager.
4. Highlight a field on the left and click the Add button in the middle. The field will be added to the Opportunity Manager.
5. On the right hand side you have the ability to arrange how the columns appear in the Opportunity Manager.

a. The field at the top of the list will appear on the left side of the Opportunity Manger
b. To rearrange the columns, highlight a field and use the Move Up and Move Down buttons at the bottom of your column listing.



The window to the left will allow you to select which columns you want to display in the Opportunity Manager.

In this window you can customize how the columns are arranged from left to right in the Opportunity Manager.

RESIZING AND RESORTING COLUMNS IN THE OPPORTUNTIY MANAGER

You can customize the order in which the columns in the Opportunity Manager are displayed and the width of each column.

To customize the width of a column:

1. In the Opportunity Manager, click your cursor between two column headers and move the column to the width you prefer.
2. Once all your columns are sized, right click on any opportunity and select "Save Preferences".
3. Next time you open up the Opportunity Manager, your columns will be displayed with your preferences.

To reorder your columns displayed in the Opportunity Manager:

1. Right click on an opportunity listed in the Opportunity Manager.
2. Select Choose Columns from the drop down list.
3. The Column Selection screen will display.
4. On the right hand side under Show columns in this order, you will see all the columns displayed in the Opportunity Manger.
5. The field at the top of the list will appear on the left side of the Opportunity Manger
6. To rearrange the columns, highlight a field and use the Move Up and Move Down buttons at the bottom of your column listing.

IMPORTING OPPORTUNITY DATA

The Prophet Import Export Wizard allows you to import data from Excel into Prophet Contacts and Opportunities.

Step I Prepare the Import File

The Import wizard will pull data into opportunities from a specific Excel format. The Import Template can be found in **C:\Program Files\Avidian Technologies\Prophet** and the Excel file is named '**Prophet Data Import Template**'. The Excel file is populated with column headers for Contact Name, Company Name, Description, Opportunity Sales Stage, Opportunity Status, Opportunity Description etc. Your data must be filled out in this specific format.

You may want to type in the Opportunity Description column 'import' so when you are viewing your list of Opportunities in Opportunity Manager, you can sort by Description and easily identify which opportunities you imported.

If you are filling in the Excel Import Template with data that is to import into an Opportunity Drop Down field, the data you are importing must match the data you have in the Opportunity Drop Down, otherwise the field will be blank in the Opportunity. For example, if your drop down values for **Sales Status** in the opportunity are **Active, Lost, Won, Cancelled** and you try to import the value of '**Import'** into the Sales Status field, the field will be blank because the value you are trying to import doesn't match the drop down values for Sales Status.

Step II Import the Opportunity Data

1. Select the arrow next to the **Tools** button in the Opportunity Manager Toolbar.
2. Select **Import and Export Wizard.**
3. Select **Import Data** and Click **Next**.

4. Browse for the file you are importing.
5. Click the **Import** Button.
6. The Contact will be created if it didn't exist. It will be saved in your Working Contact folder in Outlook and also in Contact Manager.
7. The Opportunity will be created and listed in Opportunity Manager.

SHARING OPPORTUNITY DATA WITH OTHER PROPHET USERS

Peer to Peer Sharing

Peer to Peer sharing allows Prophet Users on the same network to view each other's Opportunity Data. The Opportunities are saved on the individual computers. You are able to view the Opportunity Data saved on another computer when each computer is on. If the computer you are sharing with is off, you can not access their Opportunity Data because the data is saved on the computer that is not available.

Through the Prophet Administrator you can control whether you are allowing the remote user to only view your data or if you are allowing them to add notes and make changes to your opportunities.

- Read Only Access allows remote users to only view your Opportunity Data
- Read and Write Access allows remote users to add notes and change drop down values in the Opportunity.

Please see the Prophet Administrator section of the User Guide to learn how to set up Peer to Peer Sharing.

Viewing Contacts associated with Opportunities in Peer to Peer Sharing
With Peer to Peer Sharing you will be able to pull up and view Opportunities saved on another computer in your network. Included in the Opportunity is the contact information for the people associated with the opportunity. You will be able to view the contact information by clicking on the Contacts Tab in the Opportunity window.

The contacts associated with those opportunities are not automatically saved on your computer. If you double click on the contact associated with the opportunity, you will get a message that says:

This contact is saved on the computer you are sharing with. If you would like a copy of this contact on your computer, select Yes.

You will not be able to associate additional contacts to an Opportunity saved on another computer. Notice the Contact and Company buttons are grayed out.

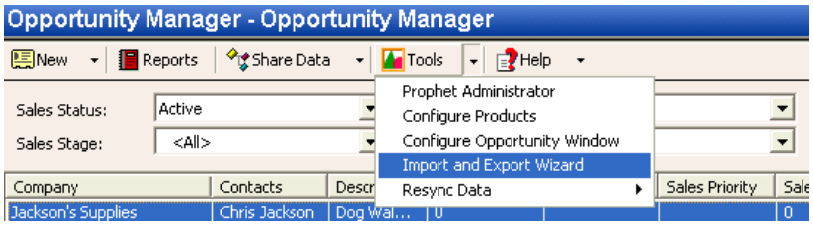
Reporting with Peer to Peer Sharing
When you run reports in Prophet while you have Peer to Peer Sharing set up, Reports will include the opportunity data for the remote computers you are sharing with as well as your own. Remember that if the computer you are sharing with is offline, you will not see their Opportunities and their data will not show in your reports.

If the Opportunity configuration is different on the computers that are sharing, when you run reports you will see all of the drop down values for all the different configurations. To keep the opportunity information consistent, you will want to make sure all users are on the same configuration.

Customized Opportunity Windows with Peer to Peer Sharing
The Opportunities you are viewing remotely reflect the Opportunity template from the computer they were created on. If you customized the Opportunity Window on your computer it does not change the labels or drop down values on the remote computer. You can share your custom template with other users by using the Import/ Export wizard in Prophet.

Sharing your Opportunity Template with other Prophet Users:

1. Configure the Opportunity Window on your computer. (see user guide for details)
2. Select Import and Export Wizard under the tools button.



3. Select Export Prophet Configuration Data.
4. The file will be saved on your computer.
5. Email the file to other Prophet Users.
6. When they receive the file, they need to save the file.
7. Select Import and Export Wizard under their tools button
8. Select Import Prophet Configuration Data.
9. Click Next.
10. Browse to where the file is saved.
11. Click receive
12. The Opportunity window will now reflect the drop down values and labels in the template you sent them.

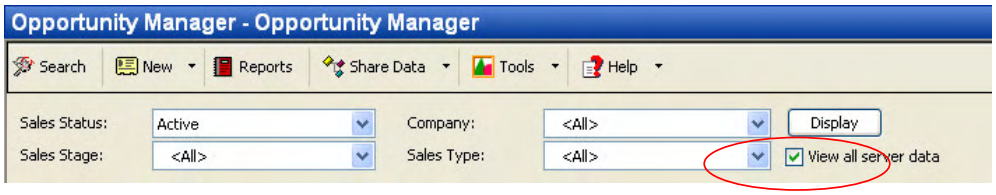
Difference between Peer to Peer Sharing and Prophet Server
The Prophet Server Edition allows your company to store all the contact, company and opportunity data on a central server. When users save an opportunity it is saved on the local computer and on the server. Users have the ability to view other user's opportunities at any time because the information is saved on the server. They can also view other users contact data (this can be turned ON/OFF by the administrator in the Prophet Administrator application).

Sharing opportunities with Prophet Server- Professional Version

For users with the Prophet Server- Professional Version installed, you have the option of viewing all opportunities saved on the server. When users that connected to the Prophet Server create opportunities, the opportunity is saved on their local machine and also on the Prophet Server.

To view all opportunities saved on the Prophet Server:

1. Open up Opportunity Manager.
2. Put a check in the box next to **view all server data** (this only shows for Prophet users connected to a Prophet Server).
3. Your Opportunity Manager will now be populated with all opportunities that were created for all Users connected to the server.
4. Uncheck the **view all server data** to return to only the opportunities saved on your machine.



Sharing Opportunities with Prophet Server- Enterprise Version

For users with the Prophet Server- Enterprise, you have the ability to set up permission groups. If you have permission to view Opportunity Data for another Prophet User you will need to click the **Account Rep** button in the Opportunity Manager toolbar.

1. Click on the **Account Rep**" button.
2. Check the Prophet User names you would like to view Opportunity Data for.
3. Click **OK**.
4. Your Opportunity Manager will display opportunities based on the Account Reps you selected.

For information about setting up Permission Groups, please see the Prophet Administrator portion of the User Guide.

Reassigning opportunities to Account Reps- Prophet Enterprise Version.
If you need to reorganize your sales department, you can reassign their Opportunities to new Account Reps by following these steps:

1. Highlight the opportunities you want to reassign.
2. To remove any Account Reps currently assigned to Opportunities:
   a. Right click on the Opportunities.
   b. Select **Remove from Account Reps.**

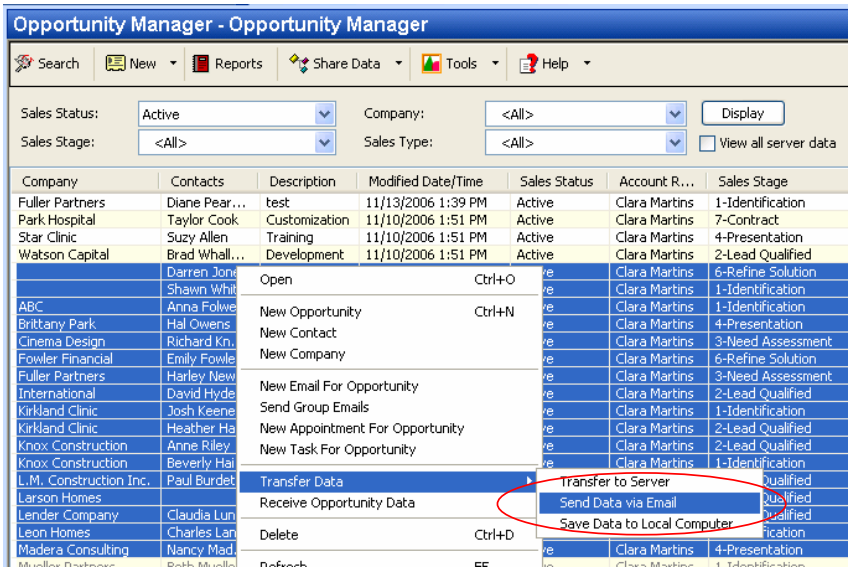
c. Check the Account Reps you need to remove from the Opportunities.
d. Click **OK.**

3. To assign new Account Reps to the Opportunities:
   a. Right click on the Opportunities.
   b. Select **Assign to Account Reps.**
   c. Check the Account Reps name
   d. Click **OK.**
4. The Opportunities will now display for the Account Rep it has been assigned to.
   a. The Account Rep will see the opportunities listed in their Opportunity Manager as long as they are connected to the server.
   b. To save opportunities to your local machine for offline use:
      i. Highlight the opportunities
      ii. Right click on the group
      iii. Select Transfer Data, Save data to local machine

Emailing opportunity data to other Prophet Users

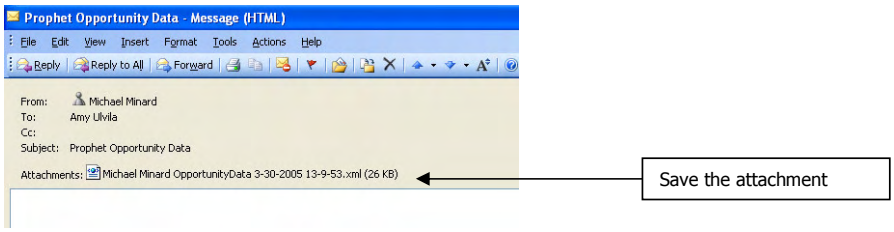
You can email your opportunities to other Prophet users.

1. Open Opportunity Manager
2. Highlight the opportunities you wish to email
   a. To highlight a group of opportunities, click on the first one, hold down the shift key and click on the last opportunity.
   b. To highlight several individual opportunities, click on one, hold down the ctrl key and click on the additional emails you wish to highlight.
3. Right click on the selected group of Opportunities.
4. From the list, select **Transfer Data**- **Send Data via Email**.
5. This will create an email with the data saved as an attachment. Fill in the email address and click S**end** in the Email Item.



Receiving opportunity files and importing them into Prophet.

1. You will receive an email that has an attachment.


Prophet Opportunity Data - Message (HTML)
File Edit View Insert Format Tools Actions Help
Reply Reply to All Forward
From: Michael Minard
To: Amy Ulvila
Cc:
Subject: Prophet Opportunity Data
Attachments: Michael Minard OpportunityData 3-30-2005 13-9-53.xml (26 KB)
Save the attachment

2. Save the attached file.
3. Open Opportunity Manager.
4. Click on the arrow next to the **Tools** button and select **Receive Opportunity Data**.
5. Browse for the file you saved and click **Open**.
6. Click **Receive** at the bottom of the screen.
7. Your Opportunity Manager will be populated with the Opportunities in the file.

NOTE You will not see the attachment in the email item, but the Opportunity attachment will be sent in the email. Multiple Opportunities will all be sent in a single attachment.

NOTE If you send someone an Opportunity and they modify it and send it back to you, once you decided to save it back to your computer, it WILL overwrite the Opportunity Data with the new data.

WORING WITH PROPHET OFFLINE

Working with Prophet offline with Prophet Server

All opportunities that you have saved on your computer will be available to you when working offline. When you are updating and creating opportunities offline, the next time you open up Prophet when you are online, the modified opportunities on your computer will automatically populate the Prophet Server.

To save opportunities on the Prophet Server to your machine:

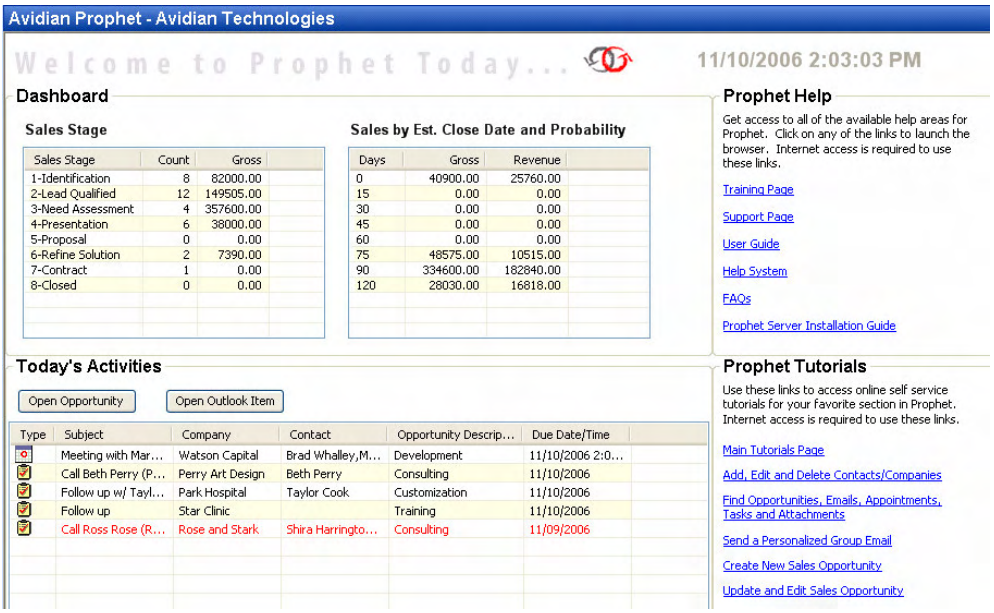
1. Open Opportunity Manager.
2. Select to display all opportunities saved on the server.
3. Highlight all opportunities saved on the server that you wish to save onto your own computer.
4. Right click on the group.
5. Select Transfer **Data**, **Save Data to Local Computer**.
6. When you disconnect from the server the opportunities you selected will be available for you to update.

PART VI- PROPHET DASHBOARD

The Prophet Dashboard is a folder that gives you an overview of the opportunities you have and the tasks and appointments you have due today.

The window is separated into 4 sections:

1. Dashboard
2. Today's Activities
3. Prophet Help
4. Prophet Tutorials


Avidian Prophet - Avidian Technologies
Welcome to Prophet Today...
11/10/2006 2:03:03 PM
Dashboard
Sales Stage
Sales by Est. Close Date and Probability
Prophet Help
Get access to all of the available help areas for Prophet. Click on any of the links to launch the browser. Internet access is required to use these links.
Training Page
Support Page
User Guide
Help System
FAQs
Prophet Server Installation Guide
Today's Activities
Open Opportunity
Open Outlook Item
Prophet Tutorials
Use these links to access online self service tutorials for your favorite section in Prophet. Internet access is required to use these links.
Main Tutorials Page
Add, Edit and Delete Contacts/Companies
Find Opportunities, Emails, Appointments, Tasks and Attachments
Send a Personalized Group Email
Create New Sales Opportunity
Update and Edit Sales Opportunity

1. Dashboard-
    a. The "Sales Stage" section shows you how many opportunities you have in each of your sales stages and the sum of the revenues associated with the opportunities in each stage...

    b. "Sales by Est Close Date and Probability" section will show you how much revenue you can expect from your pipeline based on the estimated close date. Prophet is taking the Rep Probability field, Est. Closed Date Field and the Sales Revenue field and multiplying them together.

2. Today's Activities- This section shows you all the tasks and appointments that are due today. If the task or appointment is associated with an opportunity, you can highlight the task or appointment and click the open Opportunity button to go directly into the Opportunity Window. These tasks and appointments will also be displayed on your Outlook Task folder and your Outlook Calendar.

    Right click on a task and you have the option to mark the task complete, delete the task or go directly into the opportunity the task is associated with.

3. Prophet Help- This section provides links to helpful information such as Help Files, Prophet User Guide and training information.

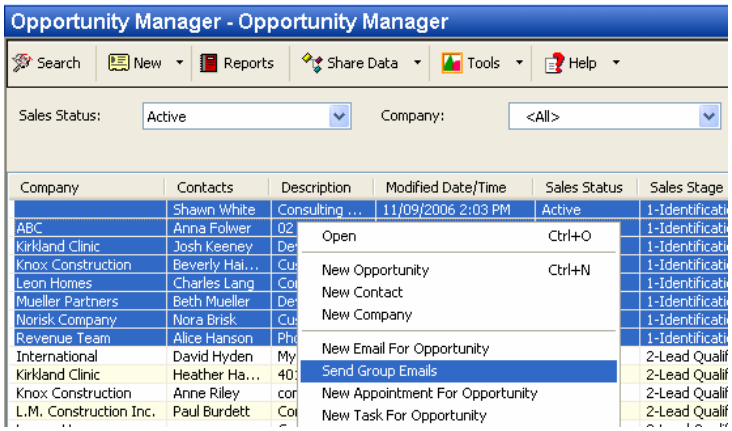
4. Prophet Tutorials- This section provides easy access to Prophet Tutorials. These tutorials will walk you through many frequently asked questions.

PART VII- GROUP EMAIL WIZARD

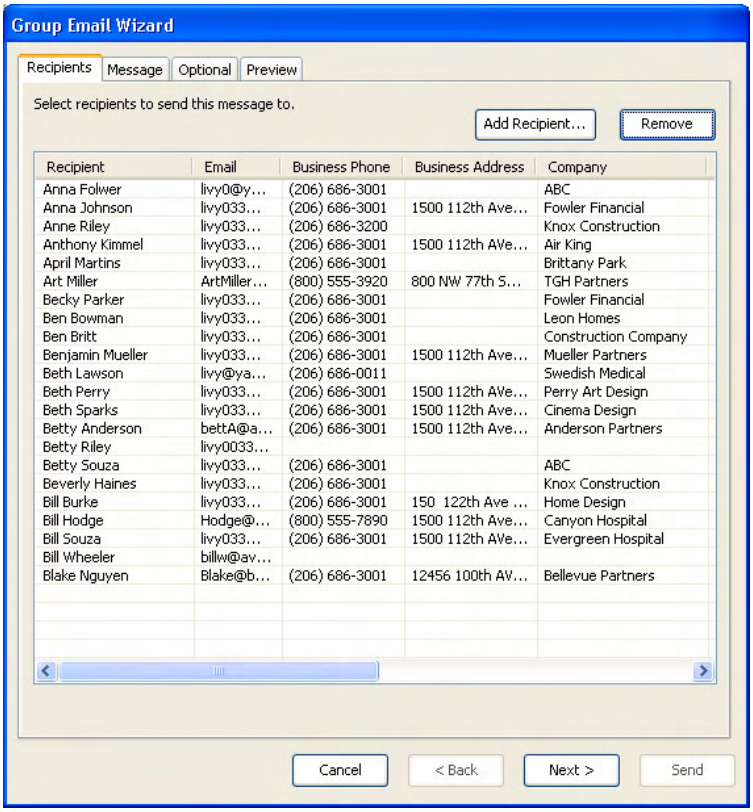
Sending a Group Email in Avidian Prophet
Using the Group Email Wizard, you can send an individual email to a group of people at once.

1. Open Prophet.
2. You can select the recipient list from either the Contact Manager or the Opportunity Manager.
    a. Using the Contact Manager to send a group email:
        i. Highlight the names of the people you wish to email. To highlight the whole group, click on the first name, hold down the shift key, click on the last name in the list. To select individuals from the list, click on the first name, hold the ctrl key down and click on the people you wish to select.
        ii. Right click on the group of names and select **Send Group Emails** or you can click on the drop down arrow next to the email button and select Send Group Emails. The Group Email Wizard will appear.

    b. Using the Opportunity Manager to send a group email:
        i. Sort your opportunities and highlight the group of opportunities you wish to email by clicking on one opportunity, hold down the shift key and clicking on the last opportunity in the group you wish to email. (*note:* the email will go to all the contacts listed for that opportunity)
        ii. Right click on the group that is highlighted
        iii. Select **Send Group Emails** from the list
        iv. The Group Email Wizard will appear.



3. The Group Email Wizard contains 4 tabs- Recipients, Message, Optional, and Preview

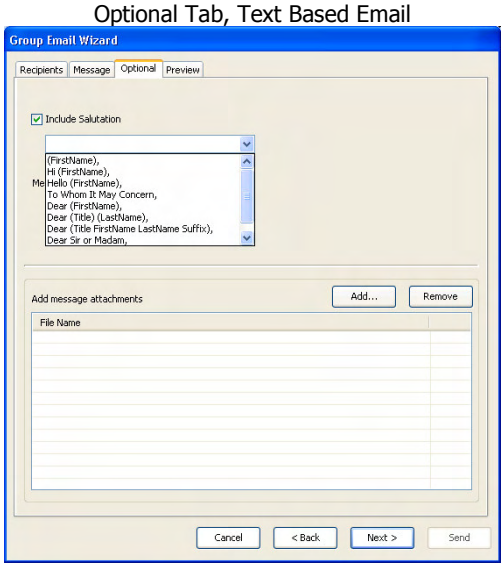

Group Email Wizard
Recipients
Message
Optional
Preview
Select recipients to send this message to.
Add Recipient...
Remove
Recipient
Email
Business Phone
Business Address
Company
Anna Folwer livy0@y... (206) 686-3001 ABC
Anna Johnson livy033... (206) 686-3001 1500 112th Ave... Fowler Financial
Anne Riley livy033... (206) 686-3200 Knox Construction
Anthony Kimmel livy033... (206) 686-3001 1500 112th AVe... Air King
April Martins livy033... (206) 686-3001 Brittany Park
Art Miller ArtMiller... (800) 555-3920 800 NW 77th S... TGH Partners
Becky Parker livy033... (206) 686-3001 Fowler Financial
Ben Bowman livy033... (206) 686-3001 Leon Homes
Ben Britt livy033... (206) 686-3001 Construction Company
Benjamin Mueller livy033... (206) 686-3001 1500 112th Ave... Mueller Partners
Beth Lawson livy@ya... (206) 686-0011 Swedish Medical
Beth Perry livy033... (206) 686-3001 1500 112th AVe... Perry Art Design
Beth Sparks livy033... (206) 686-3001 1500 112th Ave... Cinema Design
Betty Anderson bettA@a... (206) 686-3001 1500 112th Ave... Anderson Partners
Betty Riley livy0033...
Betty Souza livy033... (206) 686-3001 ABC
Beverly Haines livy033... (206) 686-3001 Knox Construction
Bill Burke livy033... (206) 686-3001 150 122th Ave ... Home Design
Bill Hodge Hodge@... (800) 555-7890 1500 112th Ave... Canyon Hospital
Bill Souza livy033... (206) 686-3001 1500 112th AVe... Evergreen Hospital
Bill Wheeler billw@av...
Blake Nguyen Blake@b... (206) 686-3001 12456 100th AV... Bellevue Partners
Cancel
< Back
Next >
Send

a. Recipients Tab list out all of the people that will be receiving your email.
   i. To delete a name from the list, highlight and click **Remove**.
   ii. To add a name to the list, click **Add Recipient** and select from your contact list.

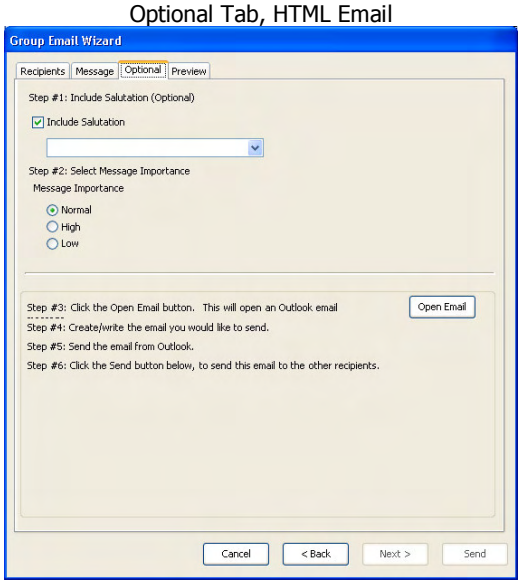
b. Message Tab is where you are going to start composing your email. You can choose to send either html or text based emails.
   i. **HTML:** The HTML message provides a lot of flexibility in terms of color and design for any email. You can create a flyer and send it as HTML in the email. If you've ever received spam and there are pictures in the email, that is an HTML email. Not everyone will be able to read your HTML message because not everyone will be able to see it. It depends on the browser they are using and the type of email editor and settings they are using.
      1. Click on the radio button labeled **Send an email with images or html**.
      2. Click on the **Next Button** at the bottom of the window.
   ii. **TEXT**: The text email message looks like a normal email. It uses text. Everyone can receive a text message. You do not get the benefit of pictures and graphics, but everyone has the opportunity to read it. You can attach files to the email.
      1. Click on the radio button labeled **Send a text based email**.
      2. Type the subject line for your email.
      3. Type the body of the email under the subject line.
      4. Click on the **Next** button and it will bring you to the Optional tab.

c. Optional Tab
   i. Optional Tab – Text Based Email
      1. When composing a Text based email, you will have the option to include a salutation in the email. Check the **Include Salutation** checkbox to include a salutation. Select from the drop down menu which salutation you wish to use.
      2. At the bottom of the screen you will have to option to add an attachment. Click the **Add** button and browse for the file.
      3. Click **Next.**
   ii. Optional Tab- HTML Email
      1. You will have the option of including a salutation in the HTML email. Check the **Include Salutation** checkbox and select from the drop down menu the salutation you want to use.
      2. Follow steps #2 through #6.
         a. Click on the **Open Email button** and compose your email. If you want a salutation to be included in the email that is sent to your recipient list, this is where you would apply it.
         b. Click **Send** in the email after you have composed it and the email will go out to the first person on your recipient tab.
         c. Click the **Send** button in the lower right hand corner of the Group Email Wizard and the email will be sent out individually to the rest of your recipients.

Optional Tab, Text Based Email



Optional Tab, HTML Email

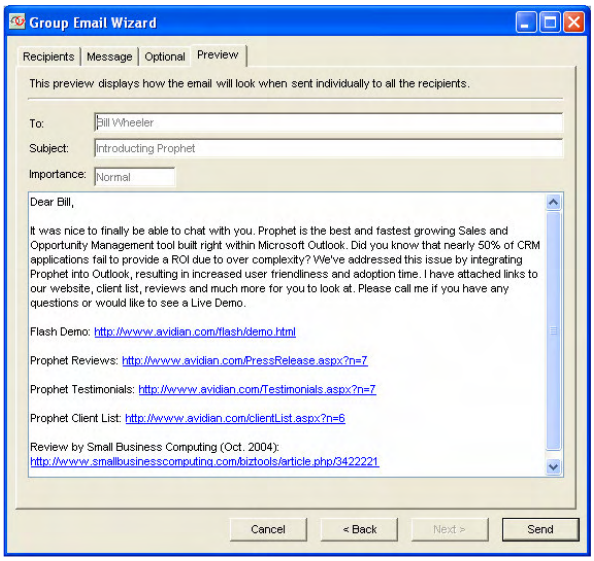


d. <u>Preview Tab</u>

i. To preview how the email will look, click you can click on the **Preview Tab**. Each recipient will receive an individual email that will look like the one you are previewing.

ii. For the Text Based email, Click on the **Send** button in the lower right hand corner.

iii. You will see the emails in your sent items in Outlook.

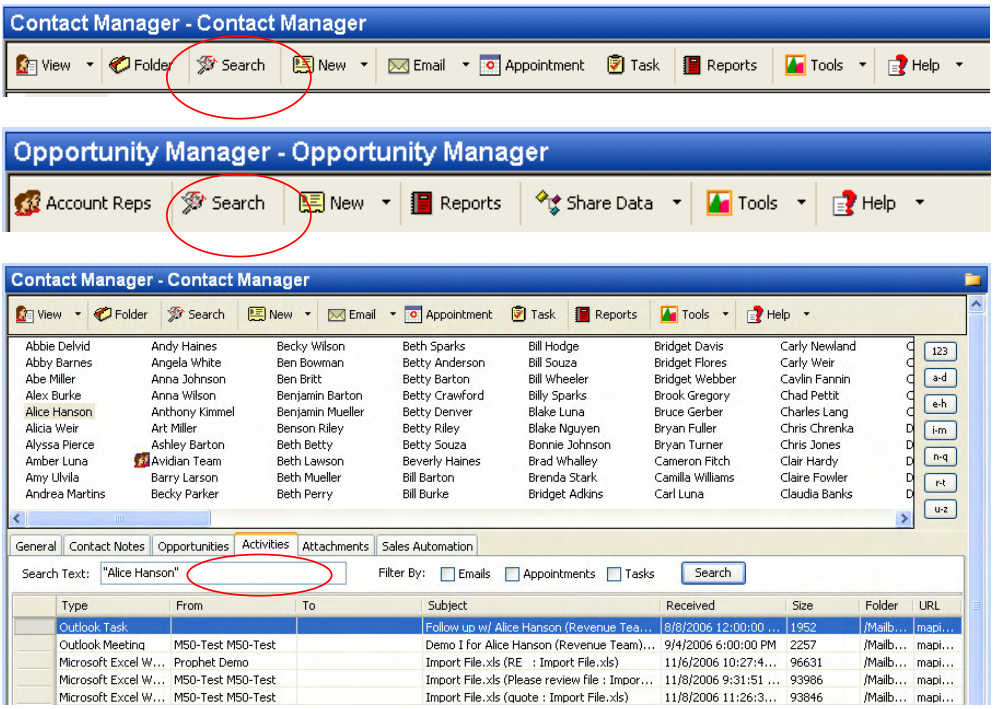

Group Email Wizard
Recipients
Message
Optional
Preview
This preview displays how the email will look when sent individually to all the recipients.
To:
Bill Wheeler
Subject:
Introducting Prophet
Importance:
Normal
Dear Bill,
It was nice to finally be able to chat with you. Prophet is the best and fastest growing Sales and Opportunity Management tool built right within Microsoft Outlook. Did you know that nearly 50% of CRM applications fail to provide a ROI due to over complexity? We've addressed this issue by integrating Prophet into Outlook, resulting in increased user friendliness and adoption time. I have attached links to our website, client list, reviews and much more for you to look at. Please call me if you have any questions or would like to see a Live Demo.
Flash Demo: http://www.avidian.com/flash/demo.html
Prophet Reviews: http://www.avidian.com/PressRelease.aspx?n=7
Prophet Testimonials: http://www.avidian.com/Testimonials.aspx?n=7
Prophet Client List: http://www.avidian.com/clientList.aspx?n=6
Review by Small Business Computing (Oct. 2004):
http://www.smallbusinesscomputing.com/biztools/article.php/3422221
Cancel
< Back
Next >
Send

NOTE Get used to creating and sending an email before trying to send them to real contacts. Test your emails with your email address first. Be sure it is what you want to send. Make your changes in the Group Email Wizard window. Once you've sent it you can't take it back!

PART VIII- PROPHET SEARCH

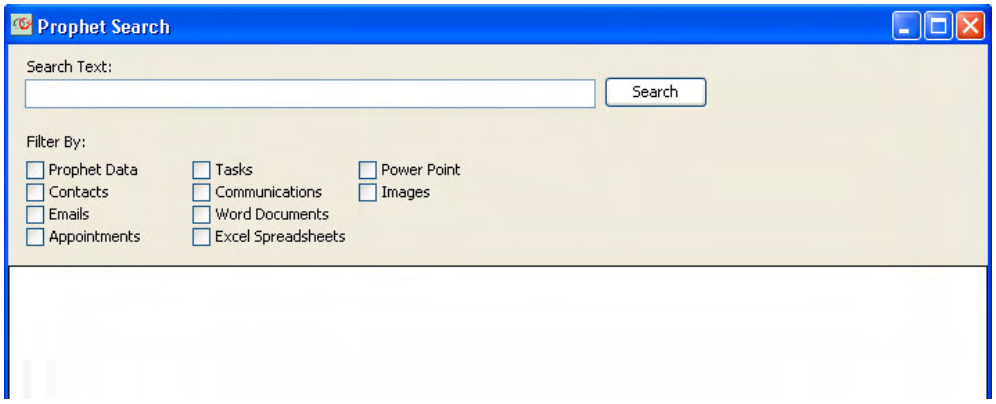
You have the ability to search your email, documents and Prophet Data using the Prophet Search. Prophet Search works with Windows Desktop Search.

When searching in Prophet, you can search files in all indexed locations. By default, Desktop Search indexes your e-mail files and files saved in the My Documents folder. However, you can have Desktop Search index other locations, including mapped network drives.



To start a search, open up Opportunity Manager or Contact Manager

1. Click on the **Search** button in the toolbar and the Prophet Search window will display.
2. Type the key word you are searching for in the 'Search Text' box.
3. Filter your search by using the 'Filter By' section.
    a. **Prophet Data** will search in Opportunities, Company and Contact records
    b. Selecting **Contacts**, **Emails**, **Appointments** and **Tasks** will search in your Outlook Folders on your machine.
    c. Selecting **Word**, **Excel** or **Power Point** will search in those specific documents.
    d. Selecting **Images** will search for images and video files.
    e. Selecting **Communications** will search Emails, Appointments and Tasks.



4. Click the **Search** button and your results will display.

Filtering your search

When you click the **Search** button and you haven't specified any filters, Prophet will default to search all.

If you filter by **Prophet Data**, the search will look for the 'Search Text' in the following locations in Prophet.

Prophet Data Searchable Fields

Company and Contact information		
Tblcompany: (Company item)	**tblcompanyaddr: (company and contact addresses)**	**Tblcontact (contact item)**
accountnum	compaddr	contactname
compname	compcity	email1
compphone	compstate	email2
compfax	compzip	email3
compwebsite	compcountry	title
compnotes	unused1	firstname
unused1	unused2	middlename
unused2	unused3	lastname
unused3	unused4	unused1
unused4	unused5	unused2
unused5		unused3
		unused4
tblcompanyUtility: (company user-defined fields when it is a textbox)	**tblcontactnotes (contact notes)**	unused5
unused1	notes	busiphone
unused2		homephone
unused3		cellphone
		fax

unused4	website
unused5	jobtitle
UtilityValue	suffix
	department

Opportunity Information		
tblincidentnote (Oppty notes)	**tblutility (drop down values that are used in oppty or company)**	**tblproductgroup (product groups)**
note	typevalue	groupname
unused1	unused1	groupdesc
unused2	unused2	groupprice
unused3	unused3	extra
unused4	unused4	unused1
unused5	unused5	unused2
		unused3
tblproduct (products)	**tblutilitytype (drop down values that are used in oppty or company)**	unused4
productname	typeid: unique id	unused5
		Tblincidentattach (oppty attachments)
productdesc	typename	createuser
productprice	displayname	attachname
extra	columnname	unused1
unused1	unused2	unused2
unused2	unused3	unused3
unused3	unused4	unused4
unused4	unused5	unused5
unused5		
tblincident (oppty item)	**tblIncidentUtility: (oppty window user-defined fields, ONLY when it is a textbox)**	
incidentdesc (oppty description)	unused1	
reason	unused2	
unused1	unused3	
unused2	unused4	
unused3	unused5	
unused4	UtilityValue	
unused5		

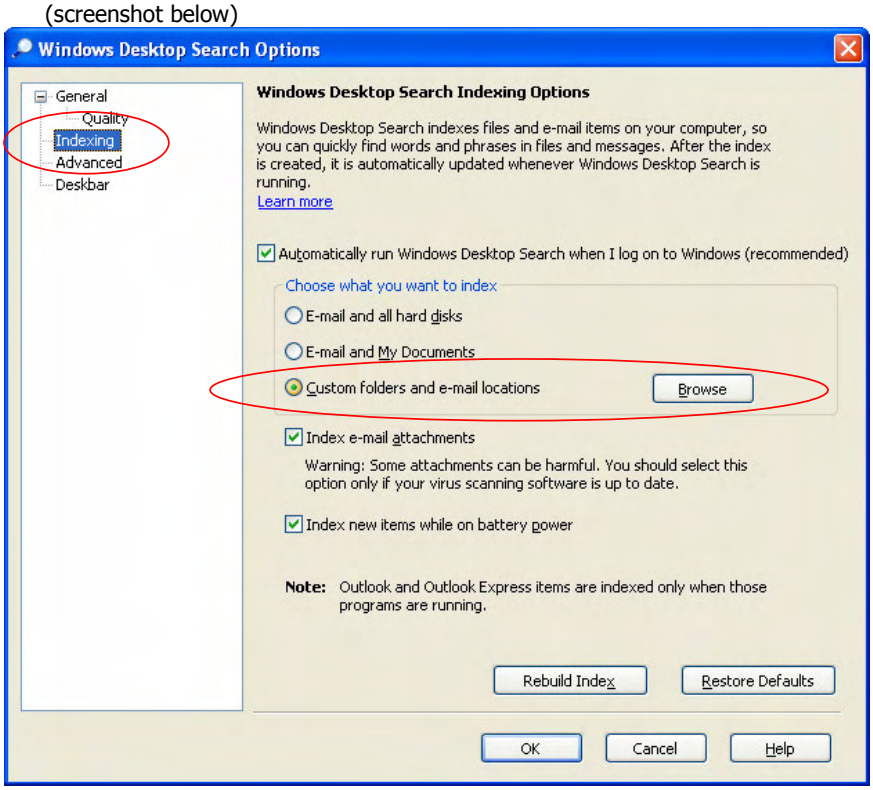
If you filter your search by Contacts, Emails, Appointments, Tasks, Communications, Word Documents, Excel Spreadsheets, Power Point or Images, the Windows Desktop Search will look in your e-mail files and files saved in the My Documents folder. You can set up Windows Desktop Search to expand the search to look in additional folders such as Public Outlook folders or Shared File folders where you may save documents.

CONFIGURING SEARCH FOR ADDITIONAL FOLDERS

To configure Windows Desktop Search to search additional locations:

1. Open **Windows Desktop Search** (Start, All Programs, Windows Desktop Search)
2. Click on the dropdown icon in the upper right hand corner.
3. Select '**Desktop Search Options**'.

4. Select the **Indexing** section.
5. Select '**Custom Folders and e-mail locations**' and click the **Browse** button (screenshot below)

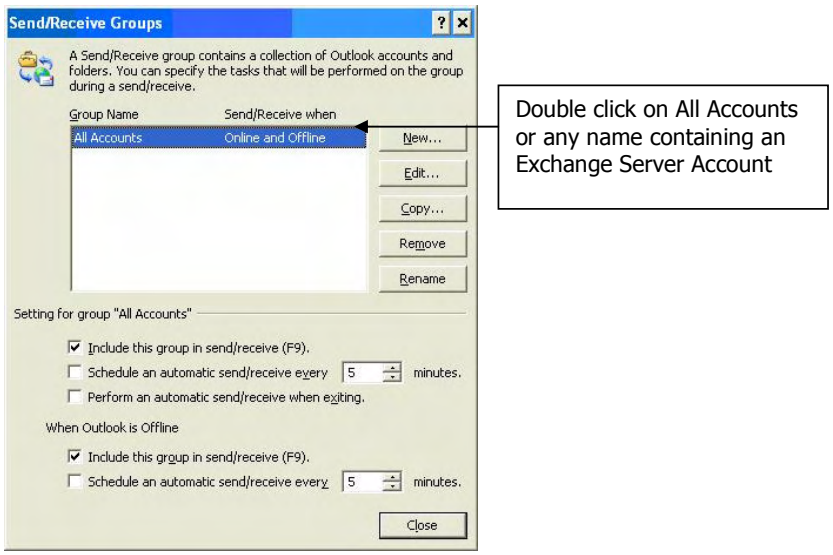

Windows Desktop Search Options
General
Quality
Indexing
Advanced
Deskbar
Windows Desktop Search Indexing Options
Windows Desktop Search indexes files and e-mail items on your computer, so you can quickly find words and phrases in files and messages. After the index is created, it is automatically updated whenever Windows Desktop Search is running.
Learn more
Automatically run Windows Desktop Search when I log on to Windows (recommended)
Choose what you want to index
E-mail and all hard disks
E-mail and My Documents
Custom folders and e-mail locations
Browse
Index e-mail attachments
Warning: Some attachments can be harmful. You should select this option only if your virus scanning software is up to date.
Index new items while on battery power
Note: Outlook and Outlook Express items are indexed only when those programs are running.
Rebuild Index
Restore Defaults
OK
Cancel
Help

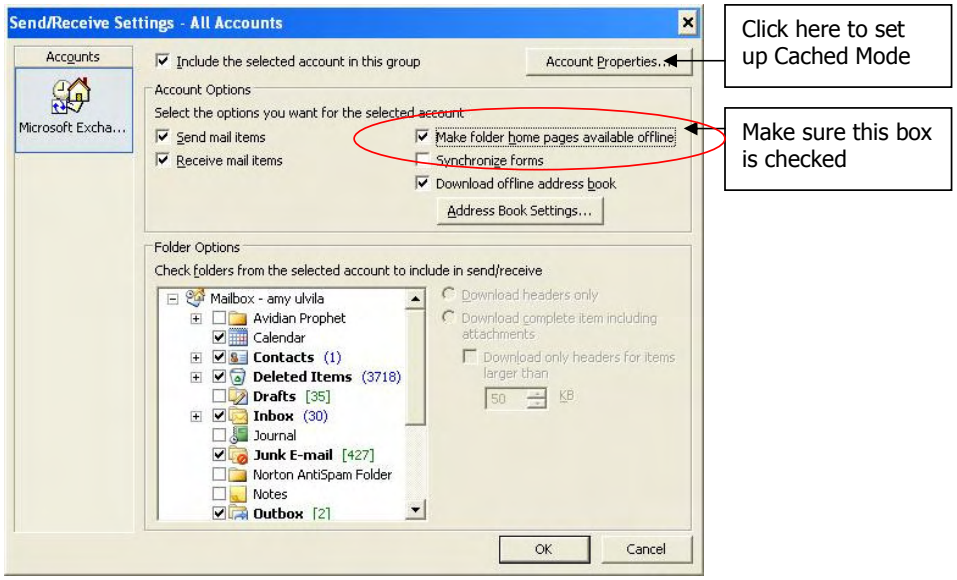
6. In the '**Windows Desktop Search Locations**' window, expand the drives and check the folders you would like to search.

7. To search in any Outlook Public Folders, you will need to set the specific Public Folder up in Cached mode. Instructions below.

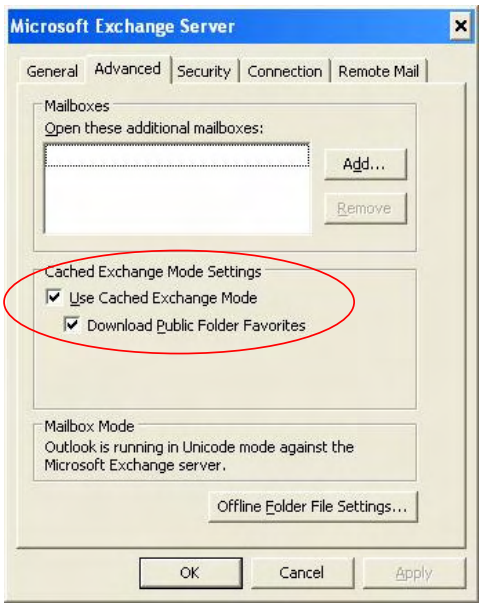
SET UP PUBLIC FOLDERS IN CACHED MODE

I. Set up cached folders
   a. In Outlook, go to **Tools**, **Send/Receive**, **Send/Receive Settings**, **Define Send/Receive Groups** (or select: Ctrl+Alt+S)
   b. In the '**Send/Receive Groups**' Window, double click on a group containing an Exchange Server Account and then click **Edit** to open the '**Send/ Receive Settings, - All Accounts**' window.


Send/Receive Groups
A Send/Receive group contains a collection of Outlook accounts and folders. You can specify the tasks that will be performed on the group during a send/receive.
Group Name
Send/Receive when
All Accounts
Online and Offline
New...
Edit...
Copy...
Remove
Rename
Setting for group "All Accounts"
Include this group in send/receive (F9).
Schedule an automatic send/receive every 5 minutes.
Perform an automatic send/receive when exiting.
When Outlook is Offline
Include this group in send/receive (F9).
Schedule an automatic send/receive every 5 minutes.
Close
Double click on All Accounts or any name containing an Exchange Server Account

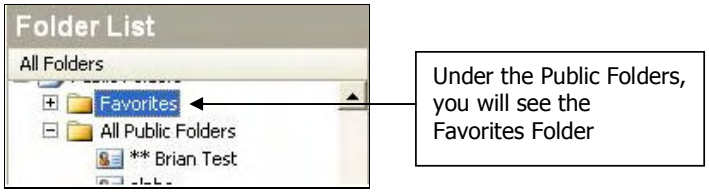


c. In the '**Send/ Receive Settings, - All Accounts**' window, check the box next to '**Make folder home pages available offline**'.
d. Click on the **Account Properties** button to set up Cached Exchange Mode.
e. Click on the '**Advanced**' Tab in the **Microsoft Exchange Server** window.
f. Check **Use Cached Exchange Mode** and **Download Public Folder Favorites**.
g. Click **Apply** and the **OK** buttons in the 'You must restart Outlook for these changes to take effect' prompt, and in the **'Microsoft Exchange Server'** window.

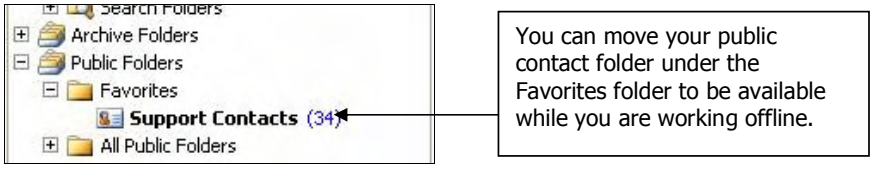


h. Click **OK** in the '**Send/ Receive Settings – All Accounts**' window.
i. Close the '**Send/Receive Groups**' window.
j. Restart Outlook.

II. Move your Public folder to the new '**Favorites**' folder
a. In your Folder List in Outlook, scroll down to the Public Folder Section.
b. Expand your Public Folders and you will see a 'Favorites' Folder.

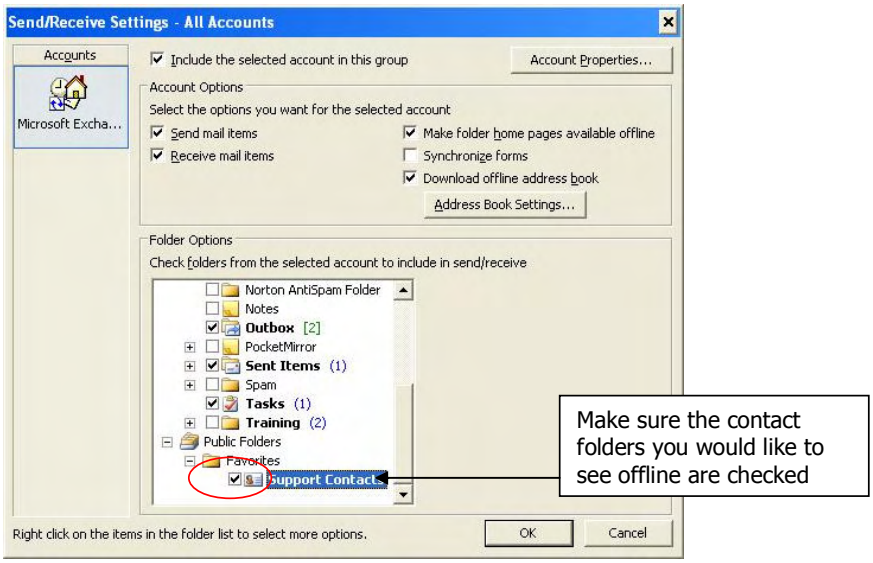


c. This 'Favorites' folder will be available to you offline so you will need to drag the Public folder you want to include in the search into this Favorites folder.
   i. Click on the Public folder in the folder list you wish to make available offline.
   ii. Drag that folder to the Favorites folder and drop.
   iii. Under the Favorites folder you will now see the folder you just copied.


Archive Folders
Public Folders
Favorites
Support Contacts (34)
All Public Folders
You can move your public contact folder under the Favorites folder to be available while you are working offline.

   iv. When you reconnect to the Exchange Server, the contacts will automatically update the Public Folder.

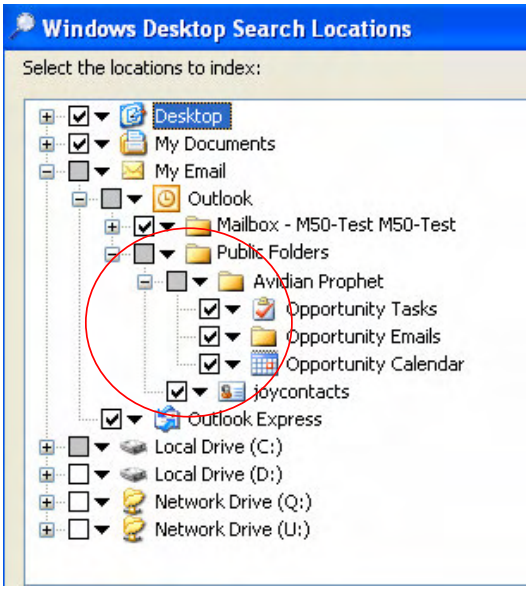
III. Select the folder you want available offline
a. In Outlook, go to **Tools**, **Send/Receive**, **Send/ Receive Settings**, **Send/Receive Groups**.
b. In the **Send/ Receive Group** window, double click on a group containing an Exchange Server Account and then click **Edit**.
c. Under the Folder Options section of the All Accounts Window, expand the Public Folders and the Favorites and put a check in the boxes next to the contact folders you wish to see offline.



d. Click **OK**.
e. Click **close** in the '**Send/ Receive Settings – All Accounts**' window.

IV. Set Windows Desktop Search to search the folders you just cached to your Favorites folder.

a. Open Windows Desktop Search.
b. Click on the dropdown icon in the upper right hand corner.
c. Select **Desktop Search Options.**
d. Select the Indexing section.
e. Select "**Custom Folders and e-mail locations"** and click **Browse.**
f. In the '**Windows Desktop Search Locations'** window, click on the plus sign next to 'My Email', click on the plus sign next to Outlook, click on the plus sign next to Public Folders and check the folders you want to search.

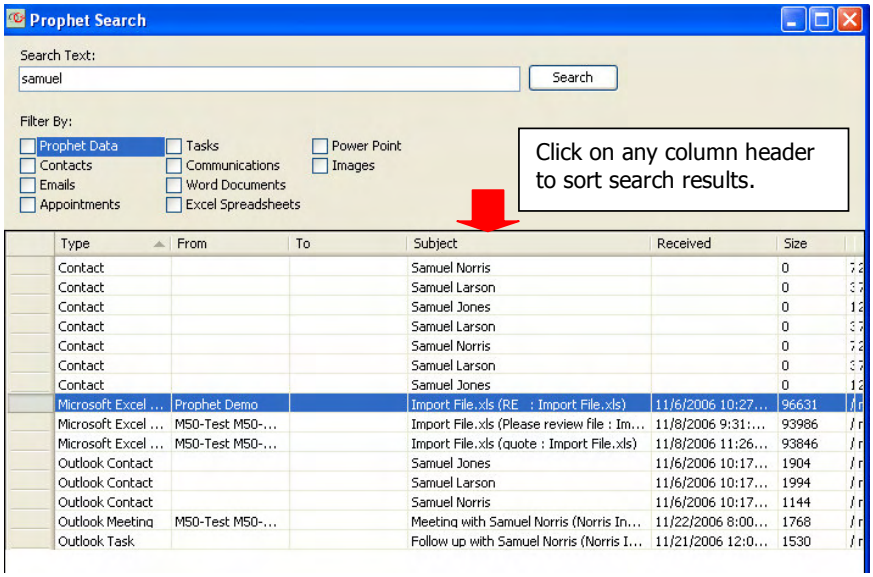


g. Click **OK** in '**Windows Desktop Search Locations'** window.
h. Click **OK** in the '**Window Desktop Search Options'** window.

VIEWING SEARCH RESULTS

To search for information associated with key words open up the Prophet Search window.

1. Click the **Search** button in the Contact Manager Toolbar or in the Opportunity Manager Toolbar.
2. Type your key word(s) in the **Search Text** field and click **Search**.
    a. To search a *and* b type **"a" and "b"** in the Search Text field.
    b. To search for a *or* b type **"a" or "b"** in the Search Text field.
3. Your search results will be listed.
4. To sort your search results, click on the column header.


Prophet Search
Search Text:
samuel
Search
Filter By:
Prophet Data
Contacts
Emails
Appointments
Tasks
Communications
Word Documents
Excel Spreadsheets
Power Point
Images
Click on any column header to sort search results.
Type
From
To
Subject
Received
Size
Contact Samuel Norris 0
Contact Samuel Larson 0
Contact Samuel Jones 0
Contact Samuel Larson 0
Contact Samuel Norris 0
Contact Samuel Larson 0
Contact Samuel Jones 0
Microsoft Excel ... Prophet Demo Import File.xls (RE : Import File.xls) 11/6/2006 10:27... 96631
Microsoft Excel ... M50-Test M50-... Import File.xls (Please review file : Im... 11/8/2006 9:31:... 93986
Microsoft Excel ... M50-Test M50-... Import File.xls (quote : Import File.xls) 11/8/2006 11:26... 93846
Outlook Contact Samuel Jones 11/6/2006 10:17... 1904
Outlook Contact Samuel Larson 11/6/2006 10:17... 1994
Outlook Contact Samuel Norris 11/6/2006 10:17... 1144
Outlook Meeting M50-Test M50-... Meeting with Samuel Norris (Norris In... 11/22/2006 8:00... 1768
Outlook Task Follow up with Samuel Norris (Norris I... 11/21/2006 12:0... 1530

5. To open the item, double click on the search result.
6. To filter your search, use the **'Filter By'** section in the **Prophet Search** window.
    a. Check **Prophet Data** to only search your Prophet Database (for searchable fields please see the Prophet Data Searchable fields section of the user guide.
    b. Check Contacts, **Emails**, **Appointments** or **Tasks** to search Outlook Contacts, Emails, Calendar, and Task items.
    c. Check **Communications**, **Word Documents**, **Excel Spreadsheets**, **Power Point** or **Images** to search your folders for the checked documents. Windows Desktop Search defaults to only search your 'My Documents' and your 'Desktop'. To configure your Windows Desktop Search to expand the search to other drives, please see the '**Configuring Search for Additional Folders'** section of the Prophet User Guide.

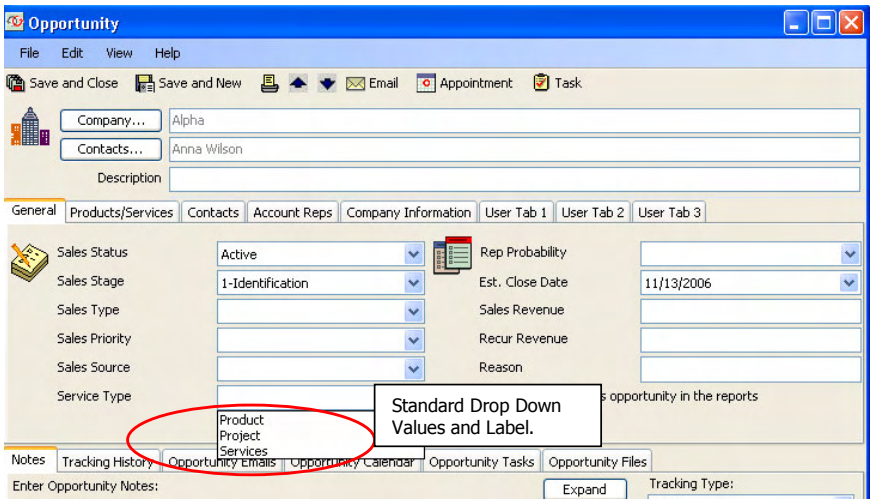
PART VIIII- PROPHET ADMINISTRATOR

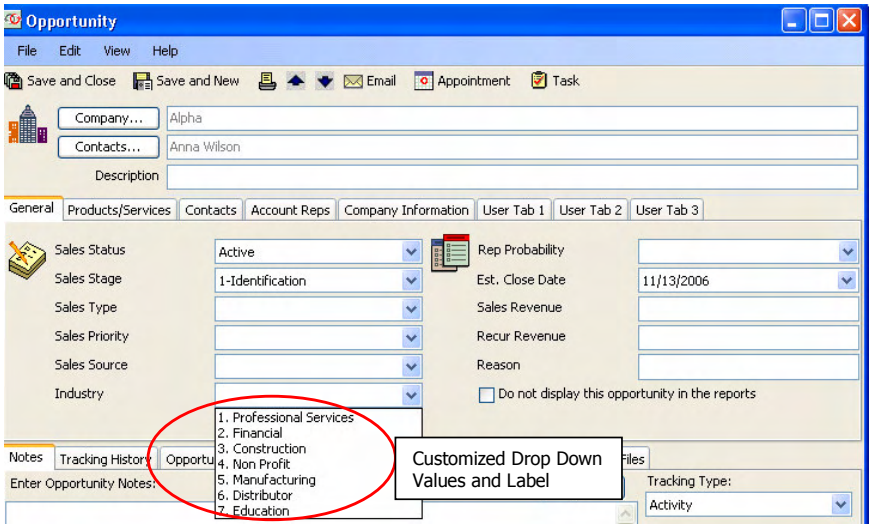
CUSTOMIZATION OF THE OPPORUTNITY WINDOW

The Opportunity Window can easily be customized to fit your business through the Prophet Administrator.

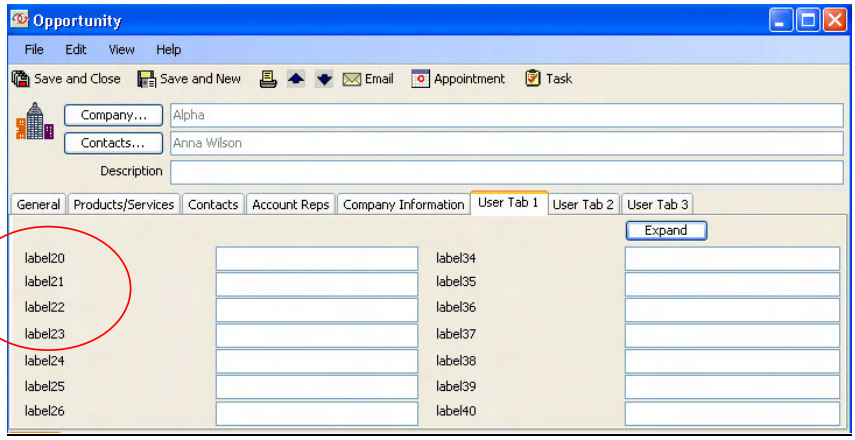
The fields that can be customized:

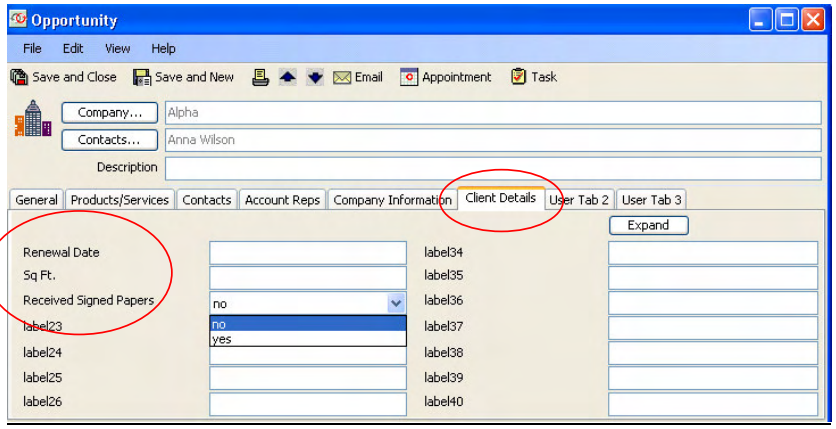
1. General Tab in Opportunity Window
   a. All the labels on this tab are customizable.
   b. The drop down values associated with the labels are customizable.



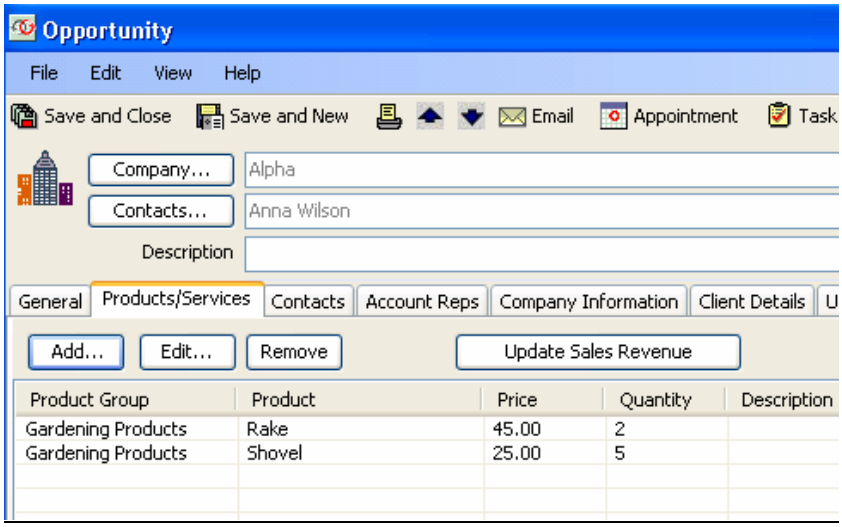


2. User Tab 1, User Tab 2, User Tab 3
   a. There are 28 labels on each tab that can be customized
   b. The fields associated with the labels can be either a text field or a drop down box.
   c. The information you are gathering on the user tabs can be pulled into Prophet Reports through the Report Wizard.



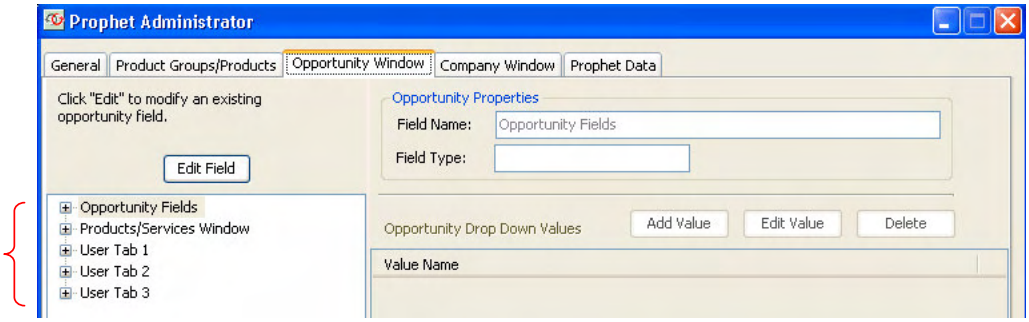


3. Products/ Services Tab
   The Product Groups and Products can be added to your Opportunities. These can be configured to your reflect your company's product line.

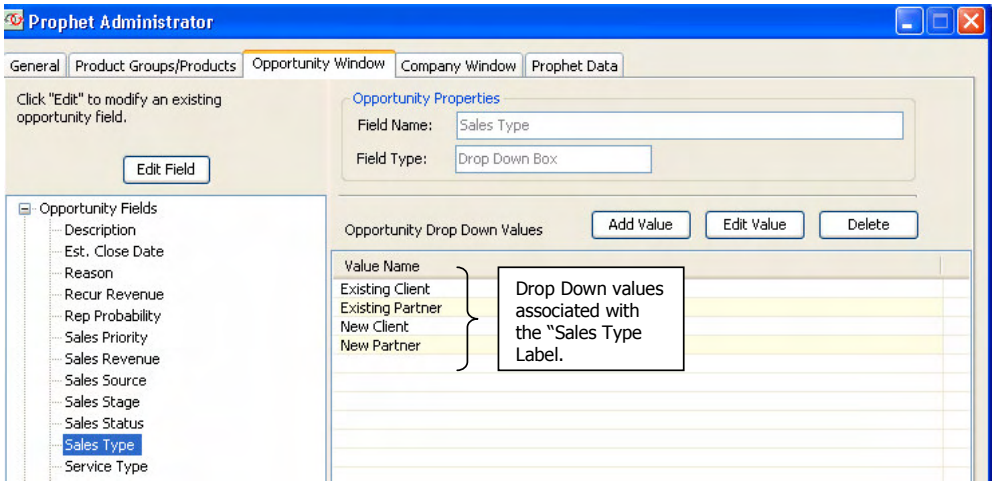


Steps to customize your Opportunity window (General Tab, User Tab 1, 2, & 3 and Products / Services labels)

1. In Contact Manager or Opportunity Manager, click on the Tools button in the Prophet Toolbar.
2. Click on the Opportunity Window tab.



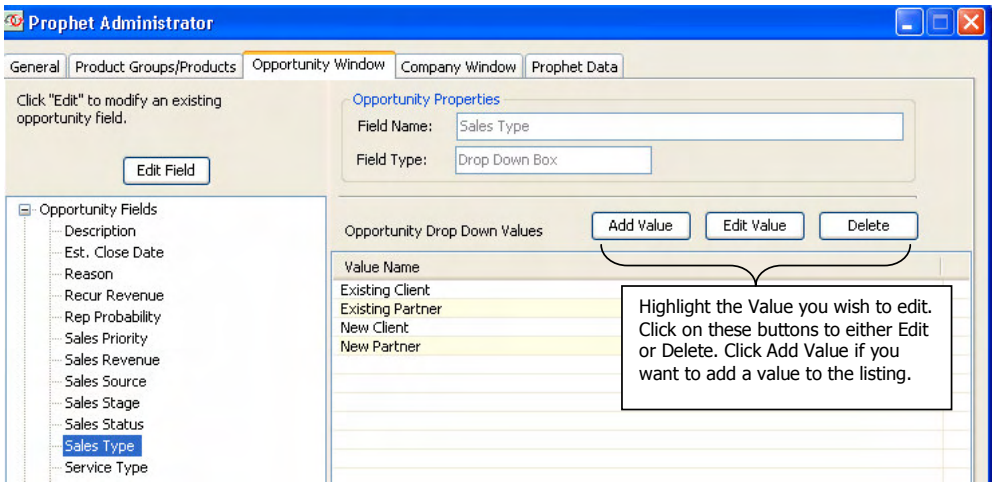
3. On the left side of the window under "Edit Field" you will have Opportunity Fields, Product/ Services Window and User Tab 1, 2, & 3 listed.
4. Click on the plus sign next to the tab you would like to edit.
5. The labels available on that tab will be listed.



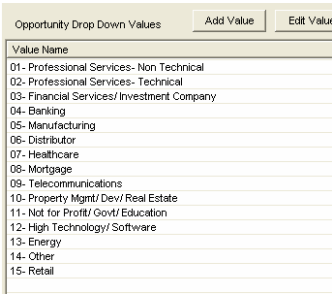
6. Double click on the label you wish to change
7. In the window that appears, type the label name you want to use.

8. Click OK
9. The label will be changed.

10. This applies to the Opportunity Fields, the three User Tabs and the labels in the Product/ Services Window.
11. To Customize the drop down values in the Opportunity Fields:
    a. Click on the label you wish to customize drop down values for.
    b. On the right hand side of the screen you will see a list of the values.
    c. Click on the value you wish to remove and click delete
    d. To add a value to the list, click on the Add Value button.
    e. When you open up an opportunity, the labels and drop down values will reflect your changes.



NOTE The listing in the drop down will be sorted alphabetically. If you want them to appear in a certain order, type a number in front of the value.



For proper sorting, use 01, 02, etc if more than 9 are to be created.

12. User Tab Field Types
    a. When customizing the fields on the user tabs you can select if they are drop down fields or text fields.
    b. In the Edit an Opportunity Label window, select from the Field Type Drop Down.

Configuring Prophet with Server installed

If you have implemented a server version of Prophet, you will need to customize the Opportunity Window on the Prophet server machine. When the client computers are connected to the server, the configuration will be saved on their machine as well. When the client machine is offline or online, it will reflect the changes you made to the opportunity window on the server.

NOTE **When customizing the Sales Status drop down, be careful not to delete Active, Won and Lost. These labels are tied to reports. Please read below for details.**

Prophet comes with standard drop down values associated with Sales Status. When customizing the Sales Status Drop down there are a couple things to keep in mind. Some of the standard reports that are included in Prophet gather data for reporting from these drop-down values.

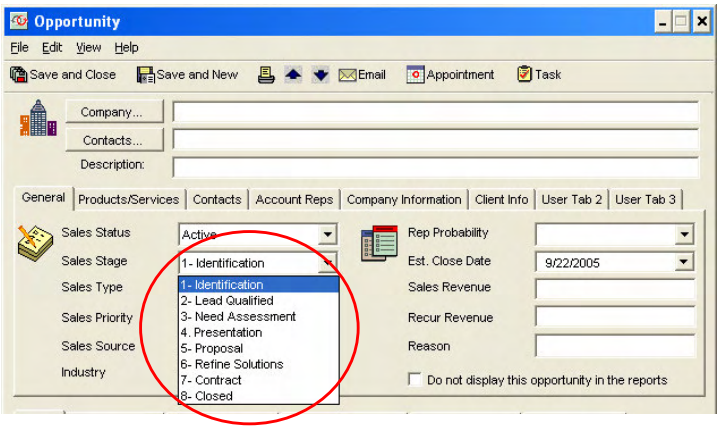
The standard values in this drop down to be careful of when customizing:

Active- Pipeline forecast category reports will report on all opportunities marked with the status "Active". If you are going to change this label, make sure you change this value to something that means the same thing as active, such as "open".

Won- Reports in the Account Sales category report off of all opportunities marked with the status of "Won". If you are going to change this value, make sure you change this label to a term that means the same thing, such as "Signed".

Lost- Reports in the WonLoss category report off of all opportunities marked with the status of "Lost". If you are going to change this value, make sure you change the label to a term that means something similar to lost, such as "Rejected".

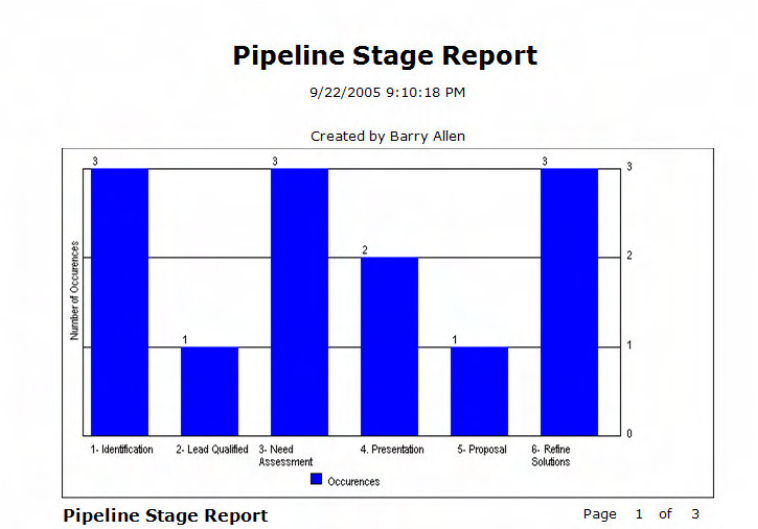
Sales Stage



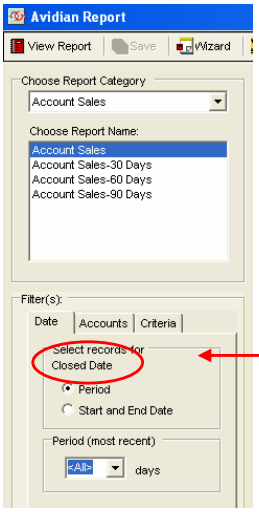
To the left you will see where the Sales Stage is located in the Opportunity Window and the drop down values associated with Sales Stage.

When customizing this label and drop down values, you should first understand where this label and drop down values appear in reports.

In the Pipeline Forecast Reports, all Active Opportunities are going to be reported on and you will see a graph that will show you how many opportunities you have in each stage in your sales cycle.



The report to the left shows a graph. The x axis is showing you the different stages in your sales cycle and the bars are showing you how many opportunities in each of those stages.



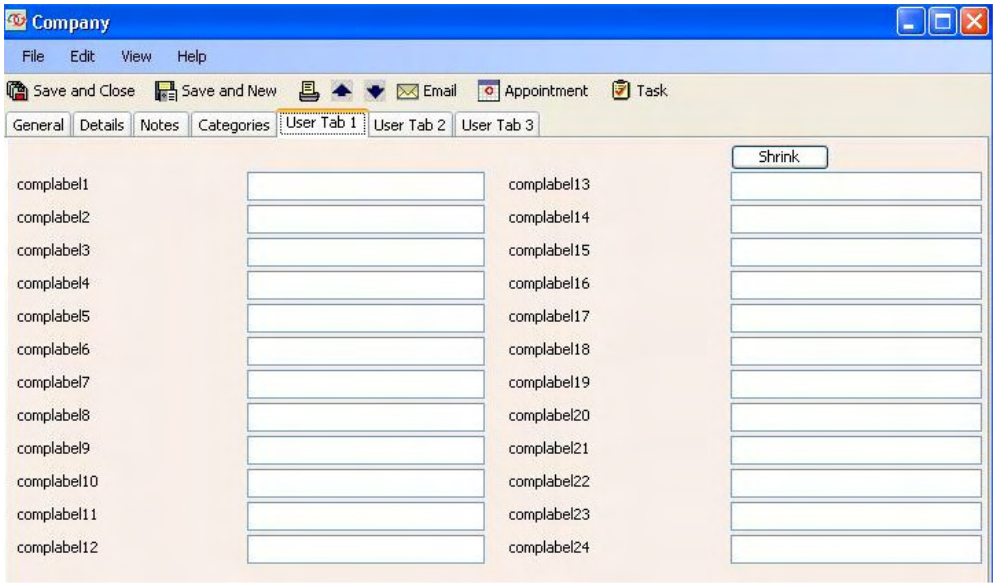
There is one value that is in the drop down list associated with Sales Stage called Closed. There is an id number associated with this drop down value. If you change this drop down value name, make sure you change it to something similar in meaning such as "won".

When you are running your Account Sales reports, you have the option of filtering your report by "Closed Date". When you mark an opportunity to the Sales Status of "Won" you can also move the Sales Stage to "Closed" and the date the Sales Stage was moved to Closed is recorded.

CUSTOMIZATION OF THE COMPANY WINDOW

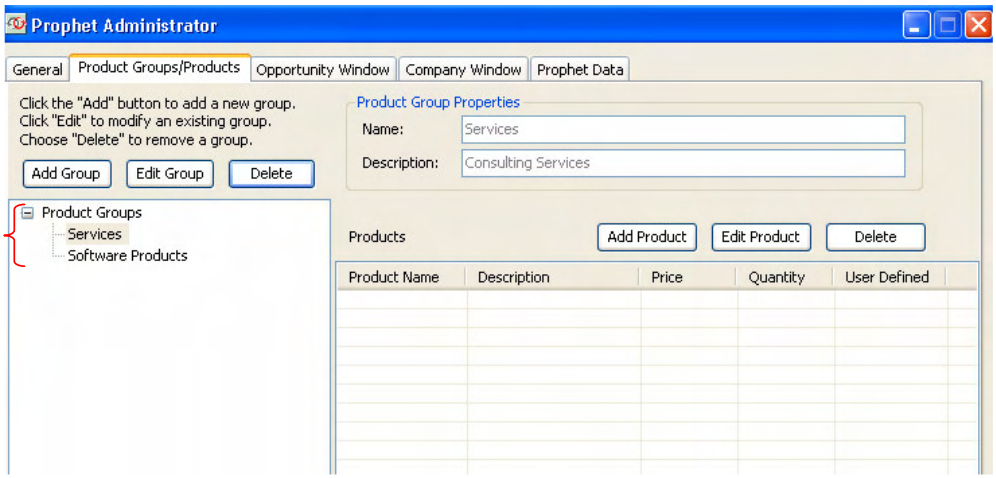
In the company record there is a user tab that is available for you to customize. To customize these fields:

1. Click on the Tools button in the Prophet toolbar.
2. Click on the Company Window Tab.
3. On the left side of the screen, click on the plus sign next to User Tab 1
4. Double click on any of the labels, label 1 through 24.
5. In the Label Name field, type in the new label name.
6. In the Field Type field, select if you want the field to be text or a drop down.
    a. If you select drop down you will need to assign drop down values to this label.
    b. Back in the Company Window tab, highlight the label you changed.
    c. Click on the Add Value button.
    d. Type in the name a drop down value.
    e. Continue to add drop down values.
    f. Notice the values are sorted alphabetically. If you want the values to list in a certain order, type a number or a letter in front of the value.



CUSTOMIZATION OF PRODUCT GROUPS AND PRODUCTS

1 In Contact Manager or Opportunity Manager, click on the "Tools" button in the Prophet menu bar.
2 Click on the "Product Groups/ Products" Tab
3 On the left you will have the list of all your Product Groups.



4 Click the "Add Group" button to add a new group.
5 To change the name of a group, highlight the group name and click "Edit Group".
6 To delete a group, highlight the group name and click "Delete".
7 To add products to the groups.
   a. Highlight the Product Group on the left.
   b. Click "Add Product".
   c. Fill in the fields and Click "Add".
   d. If you are finished adding, you can click "Close".
   e. These products will now be available on the Product/Services tab in the opportunity window.

The product labels can be customized. For example you can change the "Price" column to say "cost" if you would like. See instructions above for customizing the Opportunity Window.

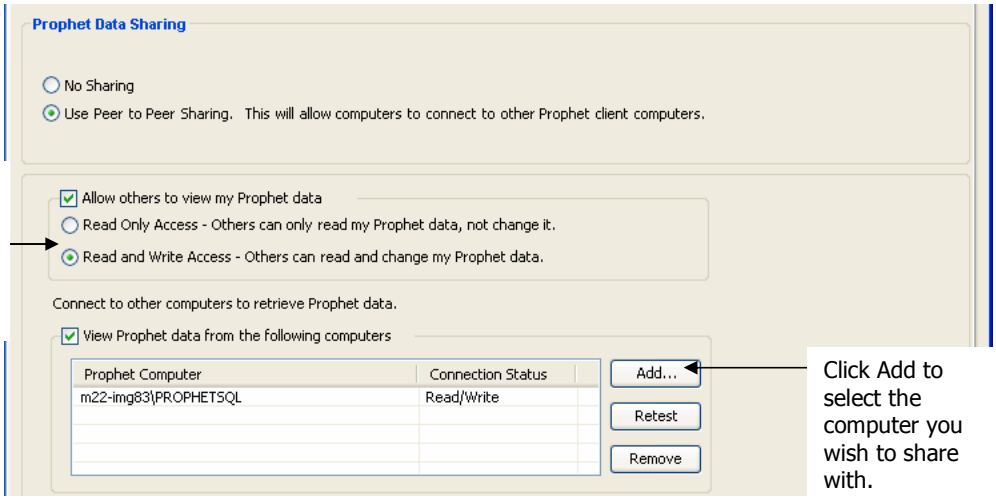
SETTING UP PROPHET SHARING

Prophet 4.0 has three levels of data sharing:
1. No Sharing
2. Peer to Peer Sharing
3. Use a Prophet Server to share data.

Setting up Peer to Peer Sharing

To set up Peer to Peer Sharing
1. Click on the tools button on the Prophet Toolbar. This opens the Prophet Administrator's "General" tab.
2. Check the radio button next to **Use Peer to Peer Sharing**.
3. Check **Allow others to view my Prophet data**.
4. Select if you want the other users to have **Read Only Access** or **Read and Write Access**.
5. Check the box for **View Prophet data from the following computers**.
6. Click on the **Add** button

7. Select the computer you would like to share with in the listing.
8. If you don't know the name of the computer you are sharing with:
    a. Go to the computer in question.
    b. Go to the start button on your computer and right click on "My Computer".
    c. Select Properties.
    d. Select the Computer Name Tab.
    e. The name of the computer will be listed next to Full Computer Name.


Prophet Data Sharing
No Sharing
Use Peer to Peer Sharing. This will allow computers to connect to other Prophet client computers.
Allow others to view my Prophet data
Read Only Access - Others can only read my Prophet data, not change it.
Read and Write Access - Others can read and change my Prophet data.
Connect to other computers to retrieve Prophet data.
View Prophet data from the following computers
Prophet Computer
Connection Status
m22-img83\PROPHET5QL
Read/Write
Add...
Retest
Remove
Select the type of access you want to allow.
Click Add to select the computer you wish to share with.

To access other Prophet User's Opportunity Information once sharing is set up.

1. Open up the Opportunity Manager
2. The Opportunities for the other Prophet user will be listed in your Opportunity Manager as long as they are online.

Customized Opportunity Windows with Peer to Peer Sharing

The Opportunities you are viewing remotely reflect the Opportunity template from the computer they were created on. If you customized the Opportunity Window on your computer it does not change the labels or drop down values on the remote computer. You can share your custom template with other users by using the Import/ Export wizard in Prophet.

Sharing your Opportunity Template with other Prophet Users:

1. Configure the Opportunity Window on your computer.
2. Select "Import and Export Wizard" under the tools button.
3. Select Export Prophet Configuration Data.
4. The file will be saved on your computer.
5. Email the file to other Prophet Users.
6. When they receive the file, they need to save the file.
7. Select "Import and Export Wizard" under their tools button
8. Select "Import Prophet Configuration Data".
9. Click "Next".
10. Browse to where the file is saved.

11. Click "Receive".
12. The Opportunity window will now reflect the drop down values and labels in the template you sent them.

Difference between Peer to Peer Sharing and Prophet Server

The Prophet Server Edition allows your company to store all the contact, company and opportunity data on a central server. When users save an opportunity it is saved on the local computer and on the server. Users have the ability to view other user's opportunities at any time because the information is saved on the server. They can also view other users contact data (this can be turned ON/OFF by the administrator in the Prophet Administrator application).

Setting up sharing with Prophet Server

The Prophet Server Edition allows your company to store all the Contact, Company and Opportunity Data on a central server. When users save an Opportunity it is saved on the local computer and on the server. Users also have the ability to view other Prophet User's Opportunities. They can also view other users contact data (this can be turned ON/OFF by the administrator in the Prophet Administrator application).

Please refer to the Prophet Server Installation Guide for detailed instructions on installing the Prophet Server and connecting the Prophet Clients.

To access other Prophet User's Opportunity Information once sharing is set up.

Prophet Professional Version

1. Open up the Opportunity Manager.
2. Check the "Show all data from the server" box.
3. Your Opportunity Manager will now be populated with all Opportunities that were created for all users connected to the server
4. Uncheck the "view all server data" to return to only opportunities you saved on your computer.

To save Opportunities on the server to your local computer to work with offline:

1. Open Opportunity Manager.
2. Check **View all server data.**
3. Highlight all the opportunities you want to save to your computer.
4. Right click on the group.
5. Select **Transfer Data**, **Save to local machine**.

Prophet Enterprise Version

SETTING UP USER PERMISSIONS

Prophet Enterprise Edition allows administrative control over what data Prophet Users can view. When you are setting up the organization you will need to assign access levels to the Prophet Users. Access levels define what Prophet data each user has access to.

Three Access levels

There are three access levels available to assign to your Prophet Users when setting up your organization. By design, users can always view data from any user ***below*** them in the tree.

Own and Reports	User can see only their own data, and the data of their direct reports, if any.
Peers	User sees their own data and the data of their direct reports if they have any, the data of their peers and any of their peers' direct reports.
Peers and Mgr	Same as 'Peers' Access, but also allows the user to view their own manager's data as well (only one level up the hierarchy).

Below is a representation of what Prophet Users would have access to with each of the three access levels listed above.

1. Each Regional Manager is given the Access Level of **Own & Reports.**

See Diagram 1:

- Regional Manager I view's everything in Red
- Regional Manager II view's everything in Green
- Regional Manager III view's everything in Yellow
- Regional Manager IV view's everything in Purple

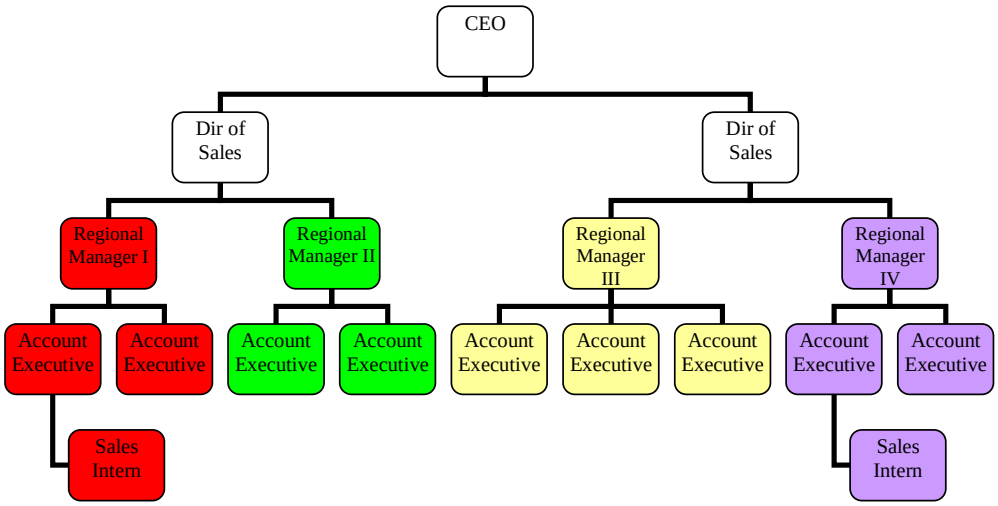


Diagram 1

2. Each Regional Manger is given the Access Level of **Peers**
See Diagram 2:

- Regional Manger I & II see everything in Red
- Regional Mangers III & IV see everything in Yellow

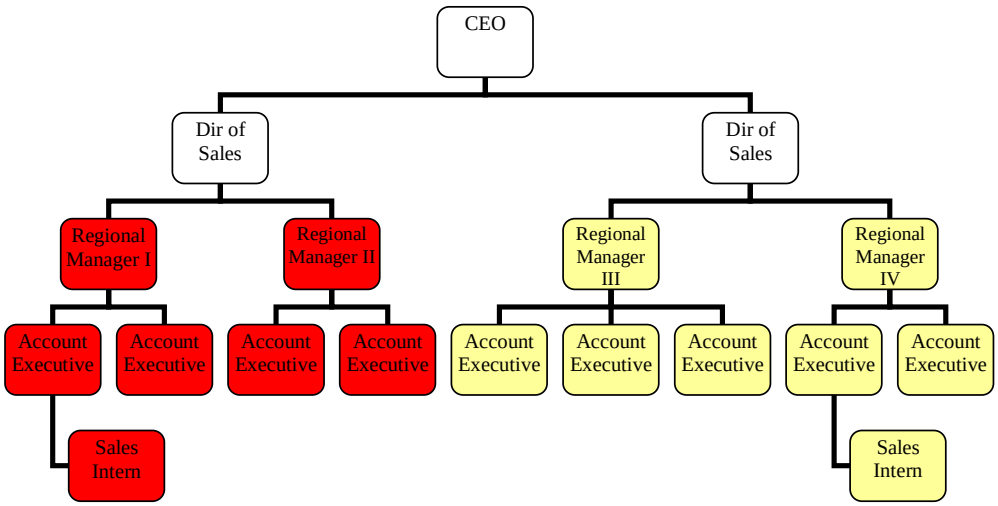


Diagram 2

3. Each Regional Manger is given the Access Level of **Peers & Manager**
See Diagram 3:

- Regional Manager I & II see everything in red
- Regional Managers III & IV see everything in yellow

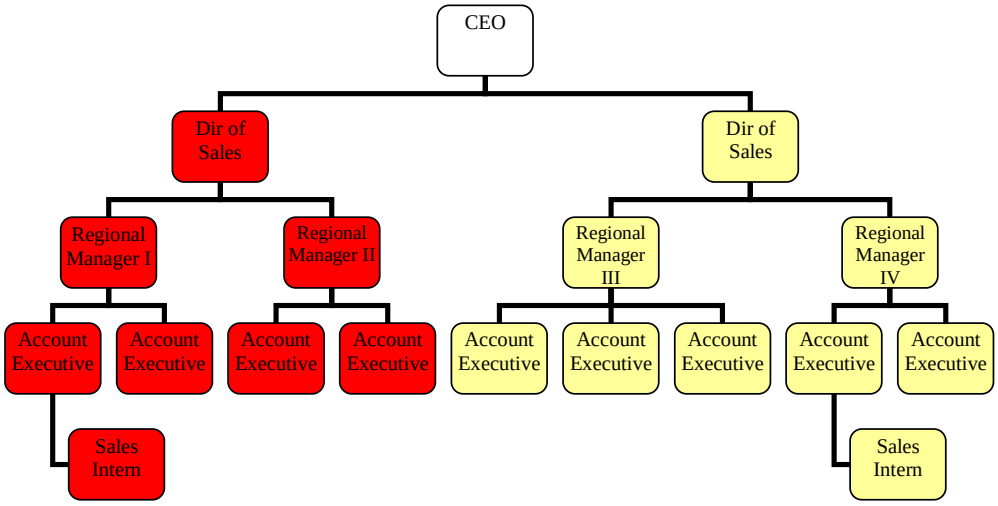
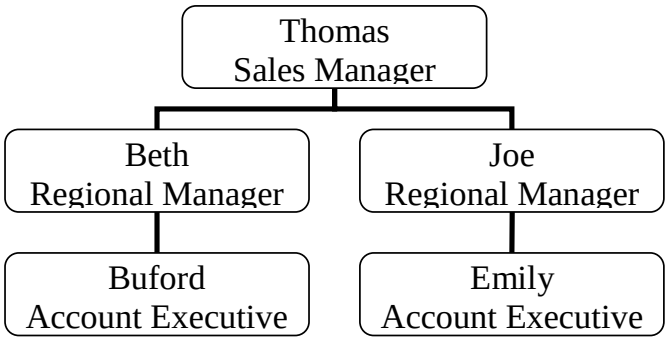


Diagram 3

To set up the organization and viewing permissions:
Setting up user permissions needs to be done on the Prophet Server.

This is the organization we are setting up.

- Thomas is the Sales Manager and call see all data
- Beth and Joe are both regional Managers. They can see their own data and any direct reports
- Buford and Emily are Account Executives and can only see their own data

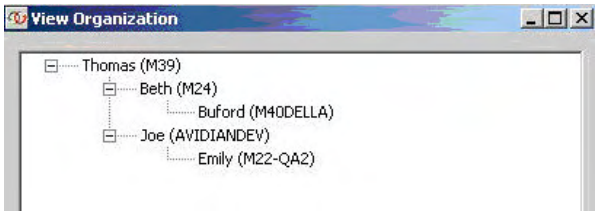


On the Prophet Server, open up the Prophet Administrator by clicking on the Tools button.

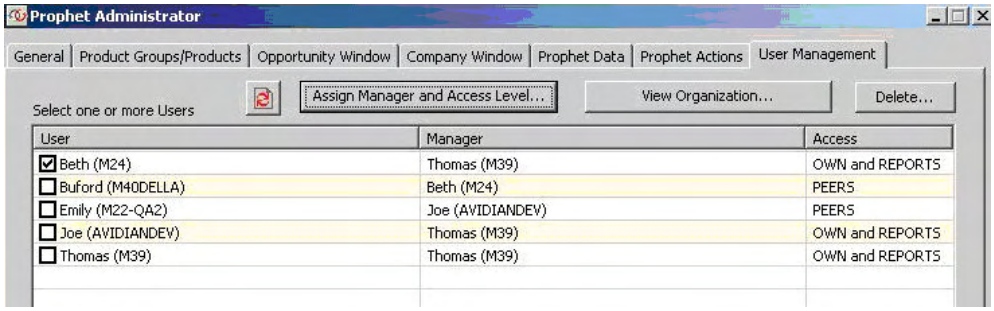
1. Click on the User Management tab.
2. All Prophet Users connected to the Prophet Server will be listed
3. To assign the Sales Manager (Thomas in the chart above)
    - Check the Manager's name
    - Click the "Assign Manager and Access Level" button
    - In the "Assign Manager and Access Level" window, highlight the manager name (them self) and select Own and Reports.
    - Click OK

4. To Assign Regional Managers (Beth and Joe in the chart above)
    - Check the Regional Managers names
    - Click "Assign Manager and Access Levels" button
    - In the "Assign Manager and Access Level" window, highlight the manager name and select Own and Reports. They will only see the data for their own team.
    - Click OK

5. To assign Account Executive groups (Buford and Emily in the chart above)
    - Check the User Name
    - Click the "Assign Manager and Access Level" button
    - Highlight their manager
    - Select Peer
    - Click OK



Below is the User Management tab for the organization. Under the User column, you see the Prophet User name followed by the computer name. Under the Manager column, you will see who the Prophet User reports to. In the Access column, you will see the access level given to them.



If Beth were given the Access level of “Peers”, Beth would be able to see data from Joe, Emily and Buford.

If Beth were given the Access level of “Peers and Managers”, she would be able to see data from Joe, Emily, Buford and Thomas.

When a new Prophet User is installed you will need to set up permissions. In the User Management tab, check the name of the new user and click on the “Assign Manager and Access Level” button. Select their manager and then select their permission level. Access levels are listed above.

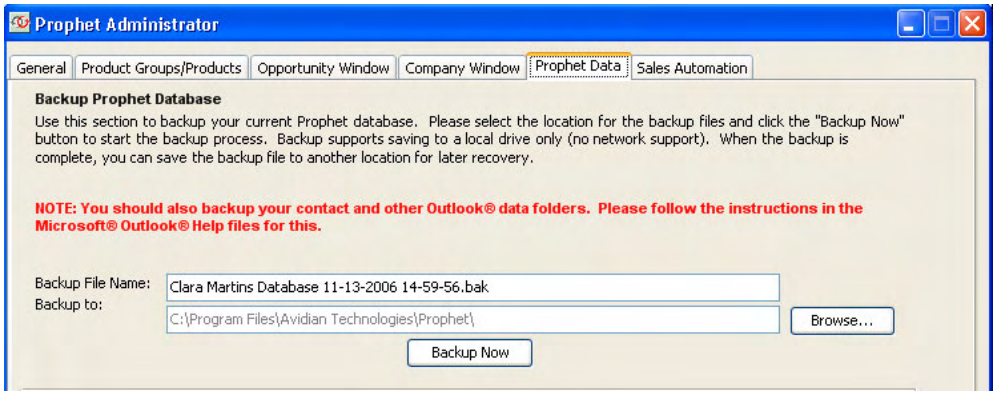
BACKING UP YOUR PROPHET DATA

To backup and restore your Prophet database

1. Open Prophet Administrator
2. Click on the Prophet Data tab
3. Click either "Backup" or "Restore". Backup will save your Prophet data to a file in the location specified in the "Backup To" field.

NOTE When using the Prophet backup feature, it does NOT backup your Outlook Data files or other Outlook data.

NOTE When restoring the Prophet backup ONLY restore it on the original computer that performed the backup. This feature is not meant to restore Prophet databases from other computers.


Prophet Administrator
General
Product Groups/Products
Opportunity Window
Company Window
Prophet Data
Sales Automation
Backup Prophet Database
Use this section to backup your current Prophet database. Please select the location for the backup files and click the "Backup Now" button to start the backup process. Backup supports saving to a local drive only (no network support). When the backup is complete, you can save the backup file to another location for later recovery.
NOTE: You should also backup your contact and other Outlook® data folders. Please follow the instructions in the Microsoft® Outlook® Help files for this.
Backup File Name:
Clara Martins Database 11-13-2006 14-59-56.bak
Backup to:
C:\Program Files\Avidian Technologies\Prophet\
Browse...
Backup Now

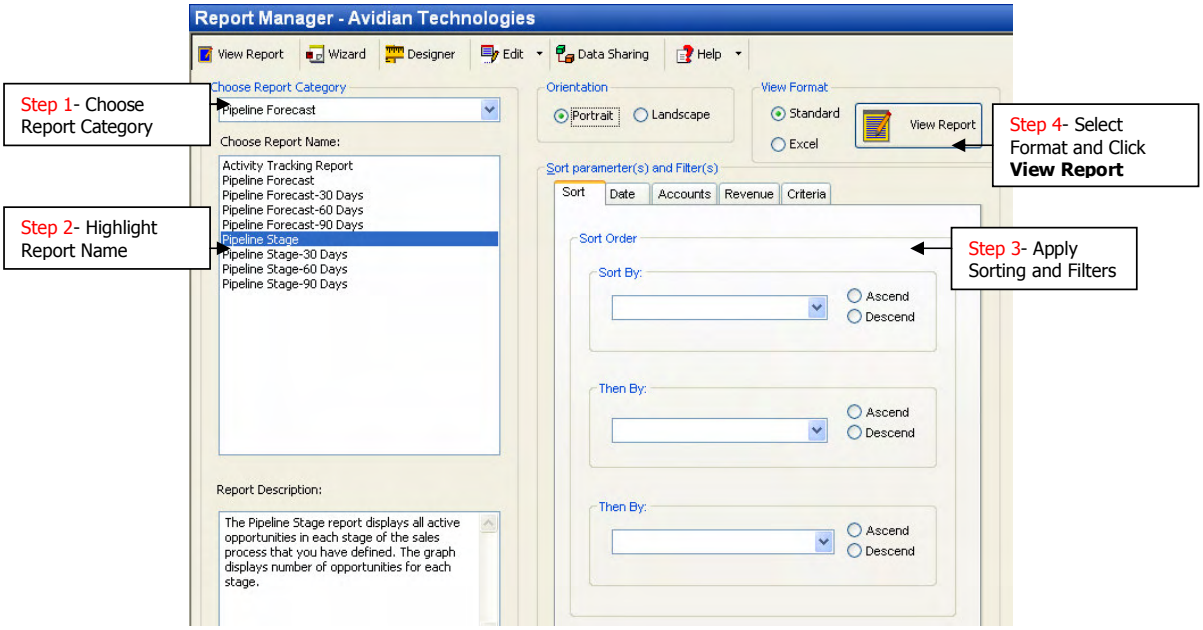
PART X- PROPHET REPORTS

Thirty-two pre-formatted reports are included with Prophet in addition to the Report Wizard for creating your own customized report documents, the Report Designer for graphic design modifications to custom reports, and the Report Administrator which enables reports to be saved in Adobe Acrobat (PDF), Word (TXT or RTF), HTML, Excel (XLS) or TIFF file formats.

The Prophet Reports can be accessed by clicking on the Report Manager folder in your folder list or by clicking on the Reports button in either the Contact Manager or the Opportunity Manager toolbar. The Reports button will launch the Report Manager, which is the interface for creating or viewing reports.

STEPS TO RUN A REPORT

Once you start creating opportunities, you will want to run reports on the information you are gathering. There are standard reports included with Prophet and you also have the option of creating your own custom reports.



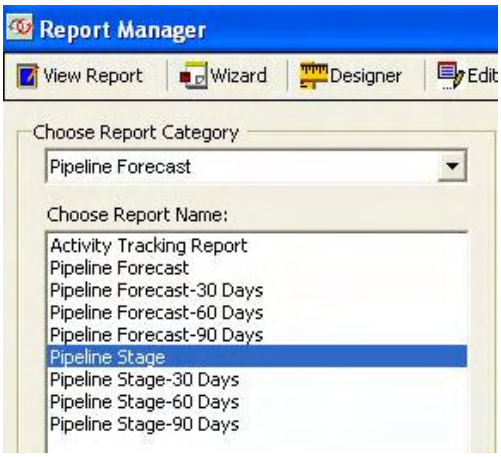
STEP 1 The first step when running a report is to select a report category.

Each report category will show you a different type of report.

- Account Sales Category- Reports on opportunities with the **Sales Status** of **Won**.
- Company Category- Pulls information on your company records.
- Contacts Category- This category of reports provide contact information.
- Opportunities Category- Reports on all Opportunities, no matter what Sales Status the opportunity has.
- Pipeline Forecast Category- This category of reports pulls information from Opportunities with the **Sales Status** of **Active**.
- Products Category- Reports on all products, products associated to opportunities and products that have been sold.
- Won Loss- This category provides reports to display information on your lost sales as well as a review of the opportunities that you have won.

STEP 2 Choose the Report

Highlight the name of the report you would like to view. A description of all of the reports will be displayed for your review in the Report Description window.



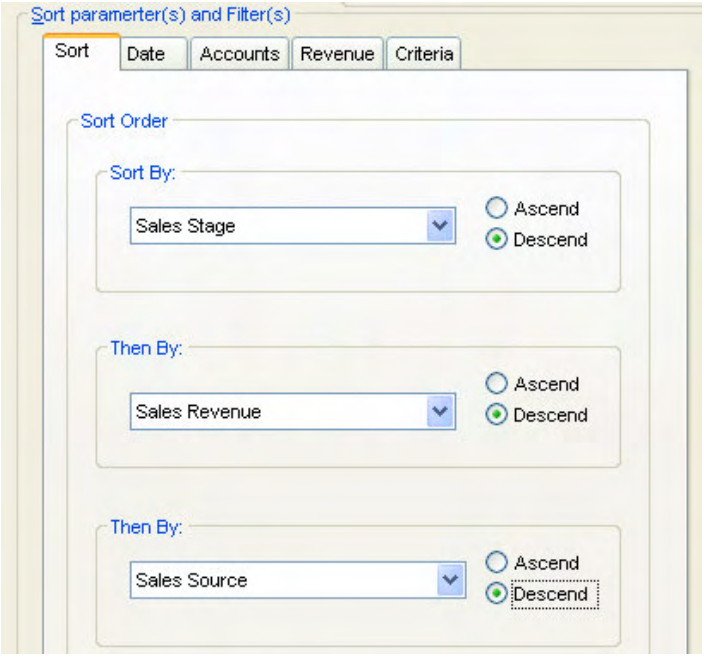
FILTER AND SORT YOUR REPORTS

STEP 3 Filter and Sort the report

For each report that you select to run, you have the option of filtering and sorting by the data included in the report. The sorting and filtering section of the Report Manager provides 4 filtering tabs (5 tabs with Prophet Professional and Enterprise Editions).

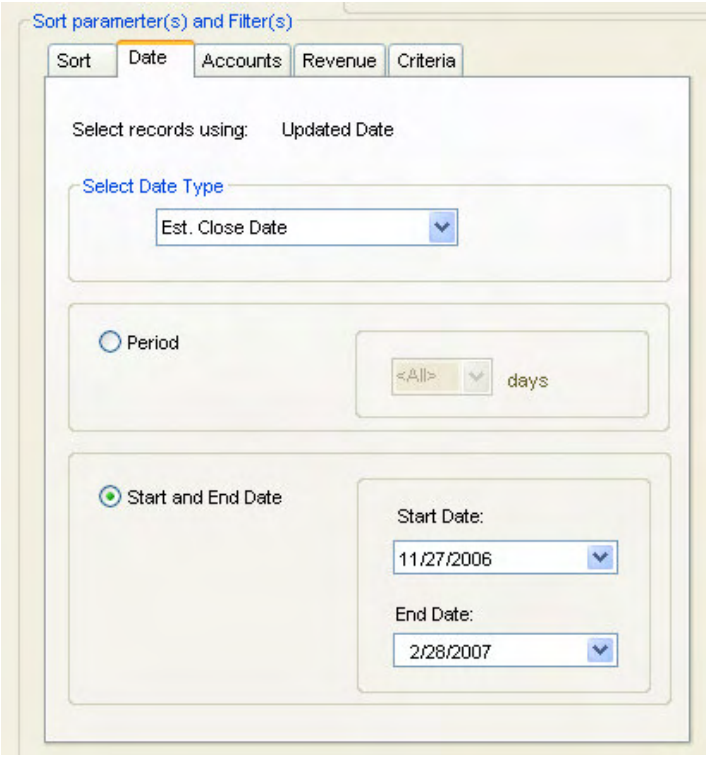
1. Sort Tab

You have the option of sorting and filtering your report by the data you are collecting. In the example below, the first sort is by Sales Stage. The report will then sort out by Sales Revenue in each stage, and then again by Sales Source.



2. Date Tab

Each report can be filtered by Date. To see which date fields are available to sort by, highlight the report name from the **Choose Report Name** field, click on the **Date** tab and select the arrow next to the **Select Date Type** drop down. Once you select the Date Type, Select the filter you want to apply. **Period** gives you set time frames or you can select using the **Start and End Date** fields. The **Period** date filter is based on past dates. To filter by future dates, use the **Start and End Date** filter option.



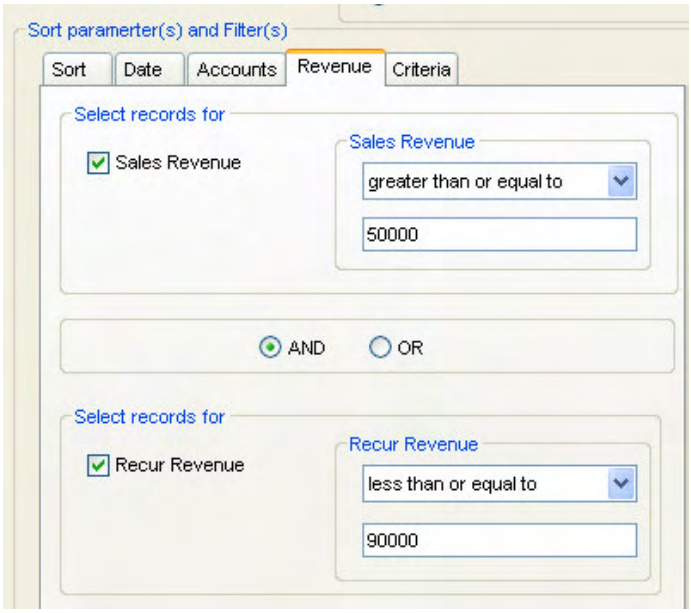
3. Accounts Tab

For each report you select to run, you have the option to filter by Accounts.

1. Click on the Accounts tab in the Filters section.
2. Select from the drop down either Company Name or Account Rep (Account Rep is only available to report from in the Pipeline Forecast, Company, Account Sales and Won Loss Categories).
3. Select from the list the Account Rep or the Company Name you want to filter by and click on the down arrow.
4. You can filter by both Account Rep and Company Name if you wish would like.

4. Revenue Tab

For each report that you select you run that includes either the Sales Revenue or Recur Revenue fields, you can apply dollar value criteria to the report.



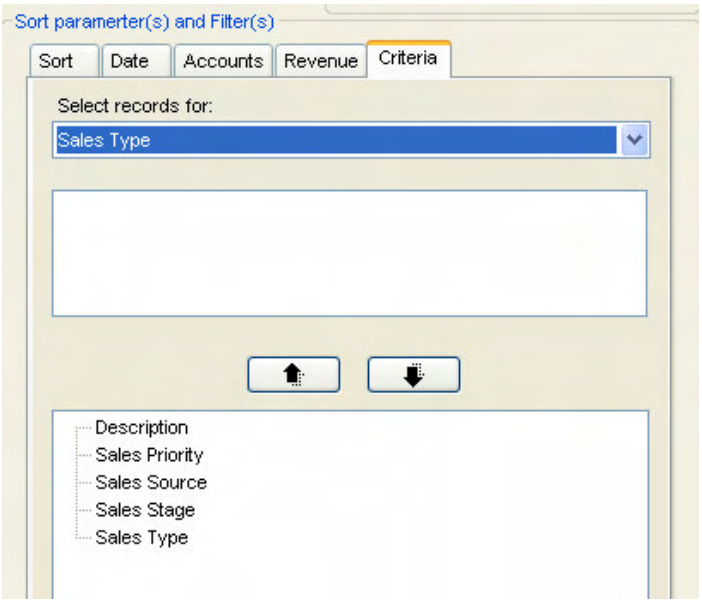
1. Click on the Revenue tab in the Filters section.
2. Check the Sales Revenue or Recur Revenue
3. Select from the Sales Revenue or Recur Revenue drop down and select the rule.
4. Now type in the dollar value you wish to filter by.
5. If you are filtering by both Sales Revenue and Recur Revenue, select if this is an AND or and OR filter.

5. Criteria Tab

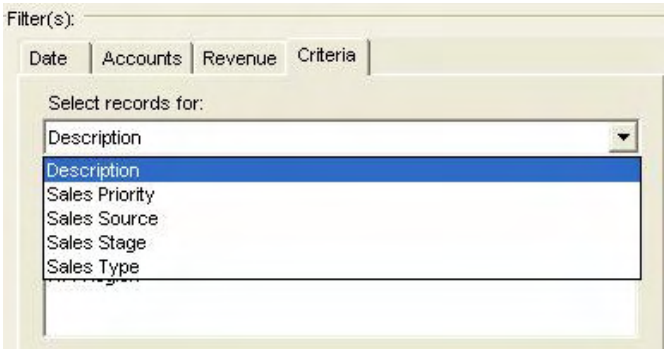
The Criteria Tab is available with the Prophet professional and Enterprise Editions only

Criteria Tab available with Professional and Enterprise Editions only.

If there are additional filters you would like to apply to your report that you didn't select in the first four tabs, you can apply those filters in the Criteria tab.



1. Click on the **Criteria** tab in the **Sort parameter(s) and Filter(s)** area.
2. Click on the drop down arrow under **Select records for**. All the fields that are included in the report will be listed in this drop down. If you can filter the fields in the Accounts tab or Revenue tab it won't be listed here.
3. Select one of the specific values you would like to filter by and click the down arrow.
4. Select Additional fields for filtering using the **Select records for** drop down list.

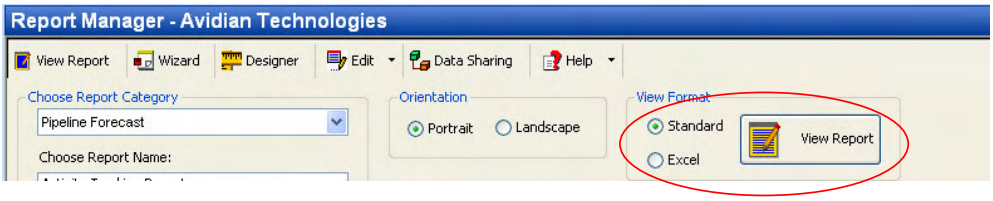


This listing reflects the data fields that will display in the report.

Select one of these fields and all values associated with that field will be listed for you to select for filtering.

STEP 4 Select Report Format

Select if you would like the report to display in Excel or in the Standard Prophet Report window and then click **View Report**.



If you select to view the report in **Excel**, the report will display in a csv file. A copy of the csv file is also saved in your "My Documents". If you want to save the report in Excel, select **File, Save As**. Name the report and change the format to Excel at this point.

If you just select Save in the csv, you will get a message that the "file already exists" because a copy of the csv is automatically saved in you're My Document folder.

STEP 5 Print or Save the report

If you select to view the report in the Standard format, you can choose to print the report, by clicking on the **Print** button in the toolbar.

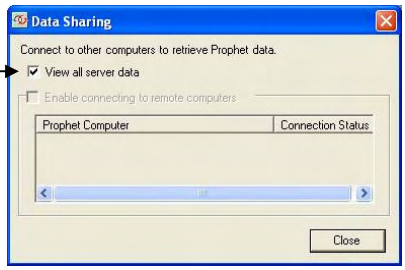
To save a report from the Standard Format:

1. Highlight the Report Name, select Standard format and Click **View Report**.
2. Click **Save** in the Report.
3. Select the File Format.
4. Select where you want to save it and give the file a name.
5. Click **OK**.

SERVER EDITION USERS

The Reports Manager will retrieve data from the local database by default. You can run reports from the server for all reps by clicking the Data Sharing Toolbar and checking the "View all server data" option.

Check View all server data and click Close



CREATING CUSTOM REPORTS

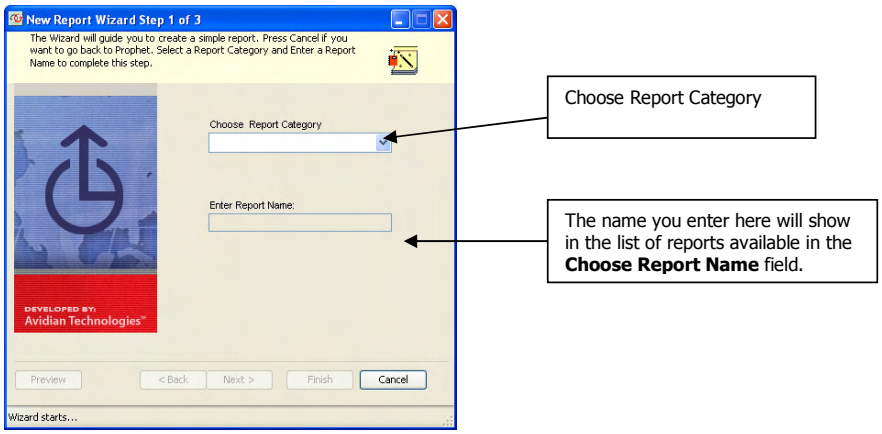
To start creating custom reports you will work through the Report Wizard. This allows you to start creating report templates that you can run when you would like.

Steps to create a custom report

1. Click on the **Wizard** button to launch the New Report Wizard Step 1 of 3 dialog.
2. Select a Report Category from the drop-down list. Each category will give you a different type of report.
    - **Pipeline Forecast** – Generates reports on Opportunities with the Sales Status of Active.
    - **Opportunity** – Reports on all Opportunities (Opportunities with any Sales Status).
    - **Account Sales** – Generates reports on Opportunities with the Sales Status of Won.
    - **Company** - Generates reports on your company records
    - **Contacts** – Generates reports on your contact records.
    - **Won Loss** – Generates reports on Opportunities with the Sales Status of Won or Lost.
    - **Products** – Generates reports on your product listing and products associated with Opportunities

    View the Report Wizard Available Fields section of the user guide for a detailed list of all fields available in each category.

3. Enter a report name, which must be unique.

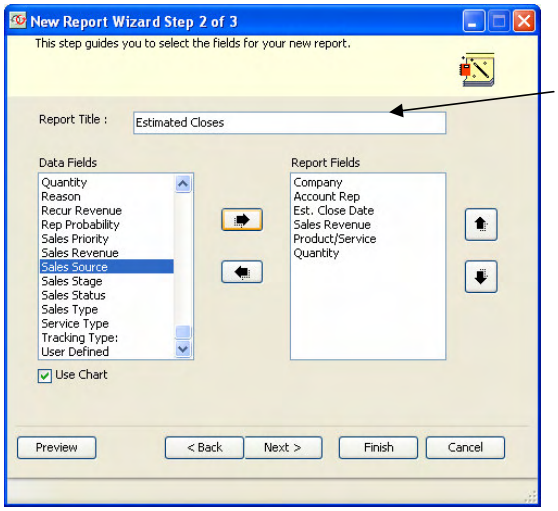

New Report Wizard Step 1 of 3
The Wizard will guide you to create a simple report. Press Cancel if you want to go back to Prophet. Select a Report Category and Enter a Report Name to complete this step.
Choose Report Category
Enter Report Name:
DEVELOPED BY:
Avidian Technologies™
Preview
< Back
Next >
Finish
Cancel
Wizard starts...
Choose Report Category
The name you enter here will show in the list of reports available in the **Choose Report Name** field.

4. Clicking **Next** will open the New Report Wizard Step 2 of 3 dialog. Enter a report title.

5. You may use a few or all of the data fields in your report by highlighting them and moving them with the arrow to the Report Fields window. The order the fields appear in the Report Fields window determines the placement from left to right on your report. Reorder the fields by highlighting a field and moving it with the up or down arrows.

Step 1: Report Title

Step 2: Select the **Data Fields** you want include in the report and click the arrow to move the field to the **Report Fields** column on the right.

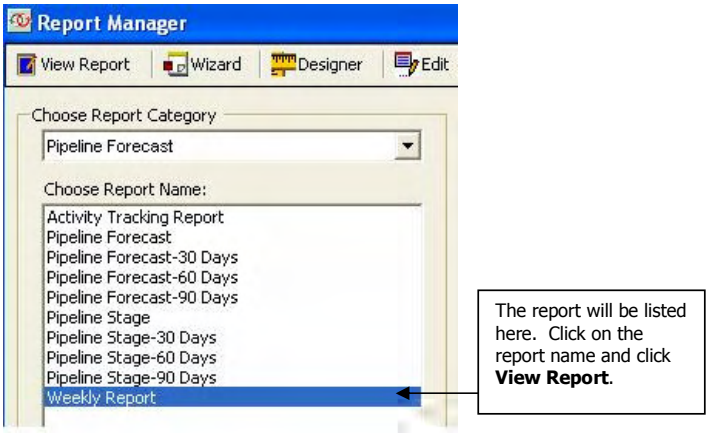


The name you enter here will appear on the report

6. You can view the layout of the report by clicking the **Preview** button. A Preview Report window opens and it can be enlarged to view the layout of your report.
7. Close the Preview window, and make any modifications to the report by adding or deleting report fields or changing the report title on Step 2 of 3, or click Back to change the report name or category in Step 1 or 3.
8. If you are satisfied, click Next to open Step 3 of 3. Some report categories have fields that can be summed; if your report category does, you can select field(s) and move them with the arrow to the Summary Fields window.
9. You can still go back to previous Steps and modify your report, or click **Finish**. A dialog will ask if you want to open your report in the Designer for additional modifications.

You have now created a report template and it will be available to run. To view your report:

1. From the Choose Report Category drop down, choose the category that you created the report in.
2. Highlight the report name.
3. Apply and filters or sorts.
4. Click **View Report**.



Export Custom Prophet Report to other users

1. Under the tools button, select Import and Export Wizard
2. Choose **Export Prophet Report** (This option allows you to share the custom report template—but not your data—with others)
3. In the Export Report window, select the Report Category and the Report Name from the drop-down lists. Type in or use the Browse button to specify the file path.
4. Click Export and Finish.

Import Custom Prophet Report from another user

1. Under the tools button, select import and Export Wizard
2. Choose **Import Prophet Report**
3. In the Import Report window, use the Browse button to select the path and filename.
4. Click Import and Finish.

Report Wizard Available Fields by Report Category

Opportunities ***(Reports on all Opportunities)***			
Account Rep	Contact City	First Name	Recur Revenue
Attach File	Contact Country	Group	Rep Probability
Business Phone	Contact Name	Home Phone	Sales Priority
Cell Phone	Cotnact Notes	IncidentID	Sales Revenue
Closed Date	Contact State	Job Title	Sales Source
Company	Contact Zip	Opportunity UserTab1	Sales Stage
Company Address	ContactID	Opportunity UserTab2	Sales Status
Company Category	Created Date	Opportunity UserTab3	Sales Type
Company City	Department	Last Name	Stage Change
Company Country	Description	Middle Name	Stage Change Date
Company Notes	Email 1 Address	Modified Date/ Time	Suffix
Company State	Email 2 Address	Note	Title
Company Zip	Email 3 Address	Price	Tracking Date
Complabel1-72	Est. Close Date	Product/Service	Tracking Type
Contact Address	Fax	Quantity	User Defined
Contact Category		Reason	Website

Pipeline Forecast ***(Reports on Active Opportunities)***		Account Sales Category ***(Reports on Won Opportunities)***	
Account Rep	Group	Account Rep	Group
Closed Date	Incident ID	Closed Date	Incident ID
Company	Opportunity UserTab1	Company	Opportunity UserTab1
Company Address	Opportunity UserTab2	Company Address	Opportunity UserTab2
Company Category	Opportunity UserTab3	Company Category	Opportunity UserTab3
Company City	Modified Date/ Time	Company City	Modified Date/ Time
company Country	Note	company Country	Note
Company Notes	Price	Company Notes	Price
Company State	Product / Service	Company State	Product / Service
Company Zip	Quantity	Company Zip	Quantity
Contact Address	Reason	Contact Address	Reason
Contact Category	Recur Revenue	Contact Category	Recur Revenue
Contact City	Rep Probability	Contact City	Rep Probability
Contact Country	Sales Priority	Contact Country	Sales Priority
Contact Name	Sales Revenue	Contact Name	Sales Revenue
Contact Notes	Sales Source	Contact Notes	Sales Source
Contact State	Sales Stage	Contact State	Sales Stage
Contact Zip	Sales Status	Contact Zip	Sales Status
Contact ID	Sales Type	Contact ID	Sales Type
Created Date	Service Type	Created Date	Service Type
Description	Tracking Type	Description	Tracking Type
Est. Close Date	User Defined	Est. Close Date	User Defined

Products Category ***(Reports on Active Opportunities)***		Won Loss Category ***(Reports on Won and Lost Opportunities)***	
Account Rep	Group	Account Rep	Group

Closed Date	IncidentID	Closed Date	IncidentID
Company Address	Opportunity UserTab1	Company Address	Opportunity UserTab1
Company Address	Opportunity UserTab2	Company Address	Opportunity UserTab2
Company Category	Opportunity UserTab3	Company Category	Opportunity UserTab3
Company City	Modified Date/ Time	Company City	Modified Date/ Time
company Country	Note	company Country	Note
Company Notes	Price	Company Notes	Price
Company State	Product/Service	Company State	Product/Service
Company Zip	Quantity	Company Zip	Quantity
Contact Address	Reason	Contact Address	Reason
Contact Category	Recur Revenue	Contact Category	Recur Revenue
Contact City	Rep Probability	Contact City	Rep Probability
Contact Country	Sales priority	Contact Country	Sales priority
Contact Name	Sales Revenue	Contact Name	Sales Revenue
Contact Notes	Sales Source	Contact Notes	Sales Source
Contact State	Sales Stage	Contact State	Sales Stage
Contact Zip	Sales Status	Contact Zip	Sales Status
ContactID	Sales Teype	ContactID	Sales Teype
Created Date	Service Type	Created Date	Service Type
Description	Tracking Type	Description	Tracking Type
Est. Close Date	User Defined	Est. Close Date	User Defined
Company Category		Contact Category	
Account Level	Country	Account Rep	Fax
Account Number	Notes	Address	First Name
Acount Rep	Ship Address	Business Phone	Home Phone
Address	Ship City	Cell Phone	Job Title
City	Ship Country	City	Last Name
Company	Ship State	Company	Middle Name
Company Category	Ship Zip	Contact	Notes
Company Fax	State	Contact Category	State
Company Phone	Website	Country	Suffix
Company UserTab1	Zip	Department	Title
Company UserTab2		Email 1 Address	Web Site
Company UserTab3		Email 2 Address	Zip
Contact		Email 3 Address	

PART XI- PROPHET FOR PALM

Prophet for Palm software is sold separately from Prophet 4.0. To purchase, please visit www.avidian.com or contact your Avidian Account Executive.

PROPHET FOR PALM VERSION I FEATURES

Prophet for Palm is an add-on to the Prophet Client and Server Edition. A licensed version of Prophet will need to be installed in order to use this application.

This application DOES NOT work on Pocket PC, Blackberry or SmartPhones devices! Soon after this product launches we will be developing Prophet PDA for Pocket PC.

There will not be an evaluation version of Prophet for Palm. Prophet for Palm will allow users to select any number of opportunities from Opportunity Manager or Contact Manager's Opportunities tab and sync the select opportunities to the Palm device. From the device the user is able to make changes to any of the editable fields and those changes will be saved to the PDA.

Once the PDA device is put back into the cradle and the HotSync is initiated, all the opportunities that have been modified or any new opportunities that have been created will sync up to Prophet. If the user has a stand-alone edition of Prophet client, the opportunities will be saved to the local database. If the user is a Prophet client connected to the Prophet Server, the opportunities will be synced to both the local database and server database

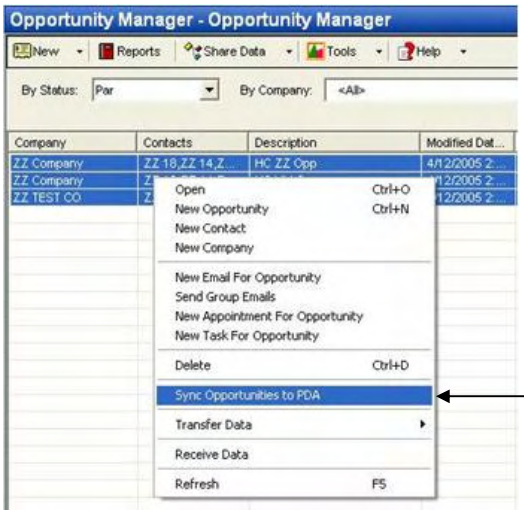
The Palm Operating System versions supported are version 3.5.1 or higher. On older models all the screens will only be in black and white. However, on newer models the screens will be displayed in color.

Navigation on the device can be done via buttons, top left menu or top right menu.

SYNCING YOUR OPPORUTNITIES TO YOUR PALM

1. Open Opportunity Manager
2. Highlight the Opportunities you wish to sync to your Palm.
3. Right Click on the highlighted opportunities
4. Select "Sync Opportunities to PDA"
5. Click on the Hot Sync Button on your PDA

NOTE You can also select opportunities from the Contact Manager to sync to the PDA.



Right Click on the opportunities and select Sync Opportunities to PDA

Launch Prophet for Palm by clicking the Prophet icon from the main list of applications

VIEWING AND EDITING OPPORTUNITY DATA ON YOUR PALM

When you launch Prophet for Palm you will see a list of all the opportunities on the device. From this screen you will be able to do the following.

1. Access your opportunity information
2. Edit an existing opportunity
3. Create a new opportunity

4. Remove an opportunity from the device. (This DOES NOT remove the opportunity from the Prophet database on your computer, it just clears it off the PDA)

When you open up Prophet on your Palm, you are going to see all the opportunities listed.

<u>To access information on an opportunity:</u>

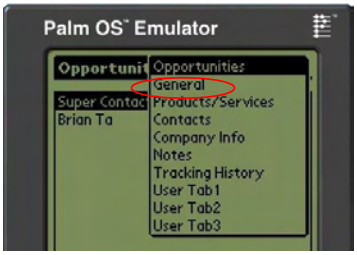
1. highlight the opportunity
2. Select the information from the opportunities drop down you wish to view.

-OR-

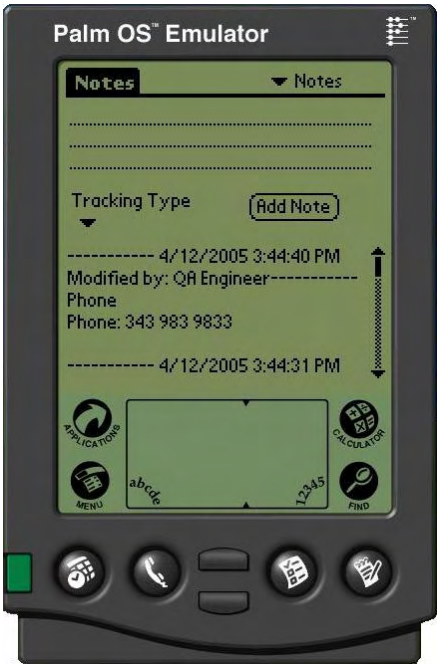
Click on the opportunity in the list and the general screen will show.

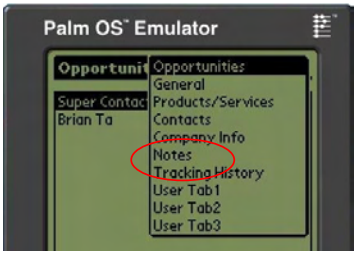
General Screen: You can make changes to any of the editable fields.

a. Company and Contact fields are READ-ONLY, but the values can be changed by clicking the "Company" or "Contact" button.
b. For Prophet stand-alone edition, the fields and drop-down values come from the local database.
c. For Prophet Server Edition, the fields and drop-down values come from the Server's database.



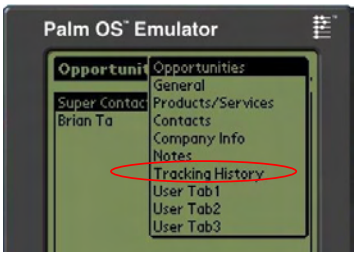
Notes Screen: Users can enter in new notes or read any existing notes.





To add a note:
Type note
Select Tracking Type
Click "Add Note"

Tracking History Screen: This is a read-only screen that lists all the activity tracking for the opportunity.

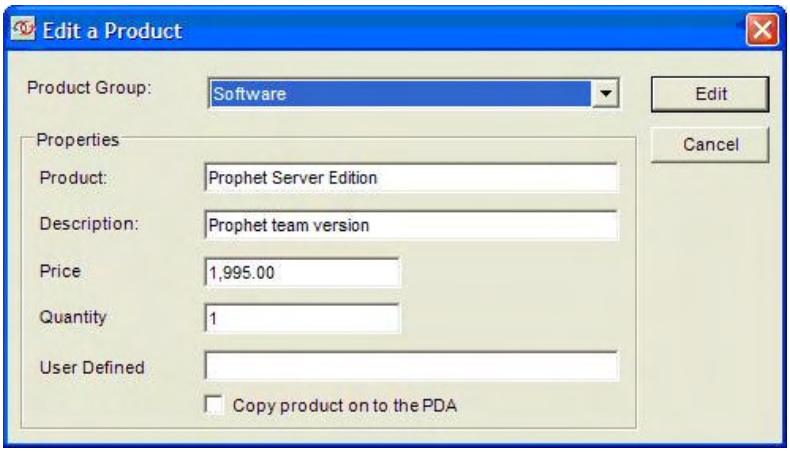


The tracking history screen will show you a summary of the notes kept in the notes tab. You can easily review the dates and times the notes were entered and the type of note.

Products/Services Screen: This displays all the products that are associated with this opportunity

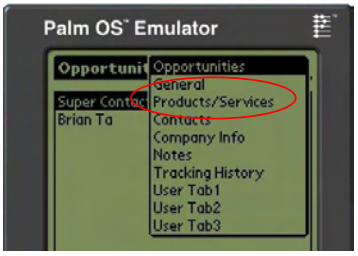
Users can add new products

i. Products need to be defined in Prophet Administrator on the computer and the checkbox "Copy Product on to PDA" needs to be checked in order for that product to be synced to the PDA.



Users can edit existing products

Users can remove products from this opportunity

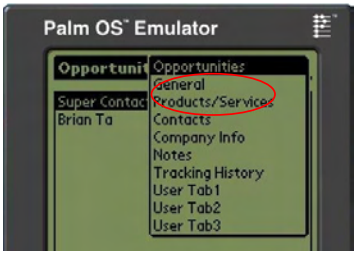


Add/Edit Products Screen: Users can add/edit products from the available choices.

To add a Product to an opportunity, go to the Product/Services section of the opportunity

Click Add
Select Group
Select Product/Service
Click Add at the bottom of the Product/ Services window.

Contacts Screen: Users can add/remove contacts from an opportunity



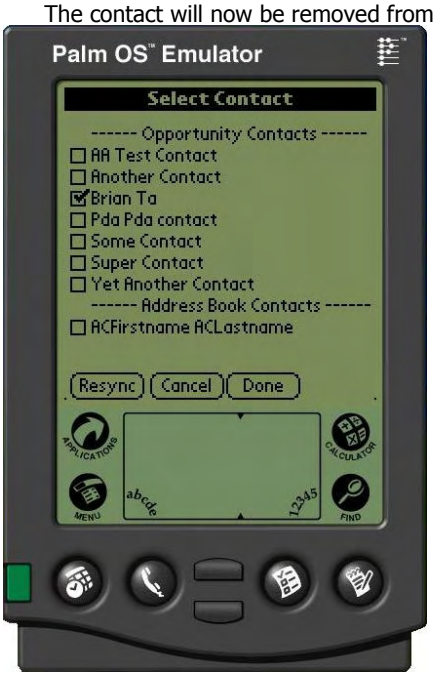
Select Contacts Screen: Users can select from a list of contacts from their PDA address book to add to the opportunity. It also included a list of contacts that are associated to other opportunities that are already on their PDA. It may not necessarily be list of all companies in Prophet.

To add a contact to an opportunity

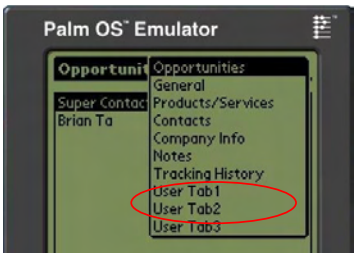
1. Select the opportunity
2. Select the contact screen
3. Click Add
4. Select from the list of contacts that are in your PDA address book.
5. Click Done
6. The contact will now be added to the opportunity.

To remove a contact from an opportunity

1. Select the opportunity
2. Select the contact screen
3. Highlight the contact you wish to remove
4. Click Remove
5. When asked to continue removing item select yes.
6. The contact will now be removed from the opportunity.



Company Screen: This displays READ-ONLY information about the company that the opportunity is for.

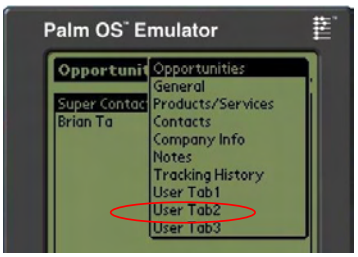


Select Company Screen: Users can choose the company associated to the opportunity. The list of companies comes from their PDA address book plus list of companies that are associated to other opportunities that are already on their PDA. It may not necessarily be the list of all companies in Prophet.

To add a company to an opportunity

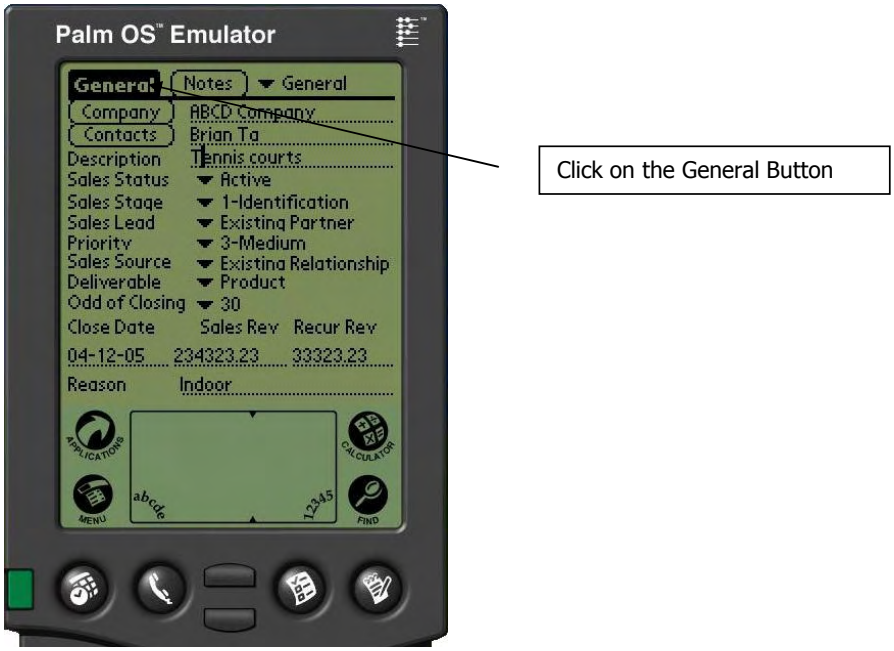
1. Open up the opportunity
2. Click on the Company button in the general tab
3. Highlight the company
4. Click done
5. The company associated with the opportunity is now changed.

User Tab Screens: These screens correspond to the User Tab 1, User Tab 2, and User Tab 3 within the opportunity window and will match the tab names and label names that have been defined in Prophet.



To Save and Close an Opportunity

1. Click on the General button
2. Select Save and lose
3. You will be back to your list of opportunities.



NOTE To users of Prophet Server: If customizations have been made to the Opportunity Templates, you will need to update Prophet Configuration Data for all client machines in order to display the customizations on PDA devices. From the Prophet Server, click "Tools" and select Import and Export Wizard. Select "Export Prophet Configuration Data" and export configuration data. Make note of the filename and location of the configuration file, this file will need to be made available to all client machines. To import Configuration Data to client machines, open Opportunity Manager and select "Import and Export Wizard" from the Tools dropdown. Select "Import Configuration Data" and select the appropriate Import File.

Part XII- CUSTOMER CARE AND CONTACT OPTIONS

Thank you for buying Prophet 4.0. In addition to the User Guide, Prophet provides online Help files, and an extensive series of Flash based tutorials, FAQ's, and Quick Tips at www.avidian.com/community.aspx

CUSTOMER SERVICE

Avidian Customer Service representatives can help you with non-technical issues, including answering pre-sales questions, checking the status of your order, registering your software, updating your contact information, or ordering a disk.

E-mail: info@avidian.com
Phone: 1-800-860-5534
Hours: Mon - Fri, 8 am to 6 pm Pacific Time

CUSTOMER CARE

If you have technical questions or issues with Prophet 4.0 or other Avidian products, please contact us at the following:

Email: support@avidian.helpserve.com
Phone: 1-800-860-5534
Hours: Mon - Fri, 7 am to 5 pm Pacific Time

PROPHET TRAINING

Attend one of our training sessions and start using all the benefits of Prophet from day one.

- Prophet Start Right Training is designed for single users or companies with less than 10 users
- Prophet Start Right Corporate Training is designed for companies with 10 users or more
- Outlook Training is designed for any single user or small business who wants to get more familiar with Outlook advanced features and begin to using them more effectively with Prophet 4.0.
- Professional Services Consulting is designed for one–on-one interaction with Sales Managers or IT Staff

Email: training@avidian.com
Phone: 1-800-860-5534
http://www.avidian.com/ProphetTraining.aspx.

PROPHET BEST PRACTICES IMPLEMENTATION SERVICE

Based on our extensive knowledge of Outlook and Exchange, the Avidian Consulting team will provide expert assistance in properly installing and configuring Prophet to meet the specific needs of your business. Your project team will support you through the process and ensure that installation and set-up are completed quickly and efficiently.

Email: info@avidian.com

Phone: 1-800-860-5534

OUTLOOK AND EXCHANGE PROFESSIONAL SERVICES

If you are looking for customized solutions for your Outlook and Exchange infrastructure, Avidian Technologies has experts ready to help. Please email sales@avidian.com.